

**CHANCELLOR'S CORRESPONDENCE ASSIGNED
"PREPARE REPLY" OR "ACTION"**

Correspondence directed to the Office of the Chancellor is sometimes assigned to senior administrators to "**Prepare Reply for Chancellor's Signature**" or for their discretionary "**Action.**" It is important to comply with the "response due date" on the index information report to ensure a timely response from the campus. If it is anticipated that an assigned due date will not be met, please inform Brenda DePeralta in the Office of the Chancellor (contact information below).

Reply Items (or Prepare Reply for Chancellor's Signature Items)

These items indicate correspondence that requires a written response *over the Chancellor's signature*. Please see the attached guidelines for preparing and submitting correspondence for the Chancellor's signature.

Action Items

An action item is correspondence that is assigned to a senior administrator for action or follow-up *on behalf of the Chancellor*. The Chancellor should be courtesy copied (cc:'d) or blind courtesy copied (bcc:'d) on any correspondence responding to an action item. The Office of the Chancellor (via Amelyn Magpantay) must be informed of all other responses (e.g., oral, email), or if a decision was made to take no action. Note that in certain cases the Chancellor will acknowledge incoming correspondence by specifically assigning the responsibility for a response to a senior administrator for "Action." In those few instances, action and a response from the senior administrator are expected, and the Chancellor should receive a courtesy copy (cc:) of the response. Similarly, if the incoming correspondence was referred to the campus via the Office of the President (OP), both the Chancellor and the appropriate individual at OP should receive a cc:.

Office of the Chancellor Contacts:

Brenda DePeralta, Communications Manager, 476-4317, bgee@chanoff.ucsf.edu

Bill Westbrook, Senior Records Analyst, 476-4421, bwestbrook@chanoff.ucsf.edu

***Questions regarding correspondence protocol or
procedures should be addressed to Brenda DePeralta.***

**CORRESPONDENCE PREPARED FOR THE CHANCELLOR'S SIGNATURE:
PROCEDURES AND GUIDELINES**

Preparing and submitting correspondence for the Chancellor's signature

Important: A lead-time of **three weeks** is necessary on proposals, articles, and any letters beyond routine letters of one page to allow for the Chancellor's absences and any potential revisions.

1. **The head of the originating office (e.g., vice chancellor, dean, chief executive officer) or their designate must review and approve the letter.** (See #4)

2. **Writing guidelines:**
 - a. Avoid the passive voice.
 - b. Steer away from generalized subject statements. For example: "I was delighted to see you" is preferable to "It was a delight to see you."
 - c. Avoid exclamation (!) and question marks (?).
 - d. Use "and" and not the ampersand (&).
 - e. Do not use the words, "insightful," "beloved," "joyful," or diction that may possibly convey a tone that is patronizing or too informal.
 - f. Avoid twisting nouns into awkward verbs (e.g., "verbing the noun").
 - g. Do not use contractions (e.g., do not use "don't").
 - h. **Avoid repetition** of words within close proximity in the text. For example, in one paragraph: "Thank you for your gift...I appreciate your support" is preferred to "I want to thank you for your gift...I am thankful for your support."

3. **Formatting guidelines:**
 - a. The **font** is **Arial**. The preferred size is 12 and never smaller than 10 (if it is absolutely necessary to fit the letter on one page).
 - b. **Date of the letter** should **not** fall on a Saturday, Sunday, or UCSF-observed holiday.
 - c. If the text **does not fill an entire page**, format the letter so that the **date aligns with the Chancellor's e-mail address**. If the text runs **longer**, format so that the **date aligns with the "J. Michael Bishop" line**.
 - d. (*Internal correspondence/memos*) Memos addressed to more than one person should be formatted with the addressees listed in order of title categories by rank (e.g., Dean, Vice Chancellor, Associate Dean, Associate Vice Chancellor, Assistant Vice Chancellor, Assistant Dean, Director, Coordinator, Manager), then alphabetical within their title categories. If management titles are not used, list the names alphabetically by last name. **SHOW NAMES IN ALL CAPS WITHIN THE ADDRESS.**
 - e. Check the spelling and middle initial(s) of any person's name (good sources include any back-file, directory, or — for UCSF internal— http://directory.ucsf.edu/people_search.jsp or for UCOP— <http://www.ucop.edu/ucophome/coordrev/images/pdf/opchart.pdf>).
 - f. If **credentials** are used, list multiple persons (either for the addressees or persons receiving courtesy copies) by alphabetical order. Double check sources on any person's credentials.
 - g. **Credentials** should incorporate full punctuation (e.g., R.N., M.D., Ph.D., D.D.S.).
 - h. **Capitalize** both words whenever the text refers to **The Regents**.
 - i. **Dashes** have a space on both sides — this style follows that used in the *New York Times*.

- j. "Street," Avenue," "Drive," etc., are spelled out in the address.
- k. Also in the address, USPS state codes should be used (e.g., CA, not California).
- l. When courtesy copies are sent (indicate by using 'cc:'), names should be listed below in the same format as the address. Unlike in the address, show names in regular style and not in all caps.
- m. (*External correspondence*) With the first mention of the university, write out "University of California, San Francisco (UCSF)." Subsequent mentions of the university are "UCSF."
- n. (*Internal correspondence/memos*) Use "UCSF," "UCB," "UC", etc. Do not spell out.
- o. For **all abbreviations and acronyms** on all correspondence, first mention should be written out and followed by the abbreviation inside parenthesis. For example: "Cardiovascular Research Institute (CVRI)." Subsequent mentions should use the abbreviation.
- p. The format for second and multiple pages applies to both external and interdepartmental (also referred to as a memorandum) correspondence:

Recipient (in the case of more than two addressees, skip this line)
 May 7, 2004
 Page Two

The letter continues on to Page Two. In the case that more than two individuals are addressed, only use the date and page number lines.

- q. The Chancellor's signature line

1) External correspondence

All external correspondence, including The Regents and legislators, is printed on **the Official Teal Letterhead (available through Reprographics)**.

The **signature line** should read: J. Michael Bishop, M.D.
 Chancellor
 University Professor
 University of California, San Francisco

This line is the only difference between the two types of correspondence

2) Interdepartmental correspondence

Internal correspondence/memos, including other UC campuses and the Office of the President, is printed on **white, 20 lb., 25% cotton bond stationery**. Departments should use the electronic copy of the template. Contact Brenda DePeralta for a copy.

The **signature line** should read: J. Michael Bishop, M.D.
 Chancellor
 University Professor

- r. Show authors' initials on one space below the signature line (in Arial 10):

JMB: followed by, in lower-case letters, the **first** and **last** name initials of the approving unit head or person who drafted the letter, which are then followed by the **first** name initial of the person who prepared the letter (e.g., Brenda DePeralta and Amelyn). Font; Arial 10.

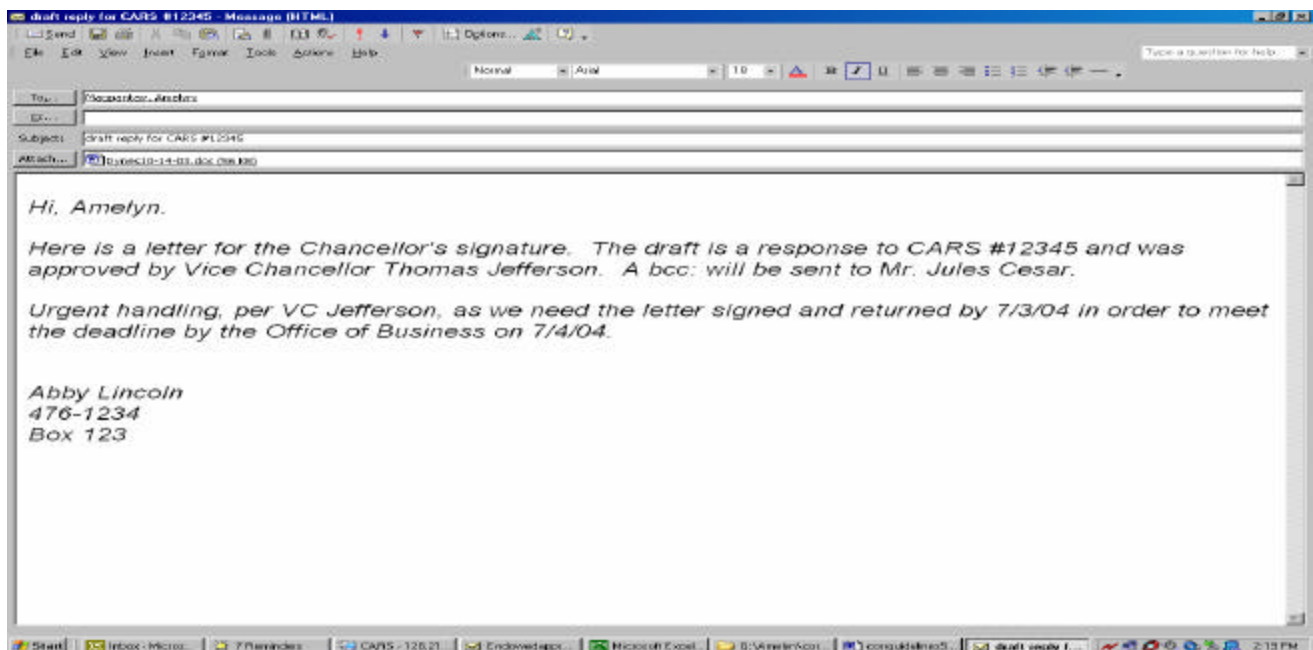
J. Michael Bishop, M.D.
 Chancellor
 University Professor
 University of California, San Francisco
 JMB:bda

- s. Before the cc: line to indicate supporting documents, use the word, “**Enclosure(s)**,” not “attachment(s).” **Check the text** of the letter to insure that it refers to the enclosure(s).
- t. In the cc: line, credentials can be used with the following guidelines: If title (Dean, Chairman, etc.) comes **before** the names, do **not** follow with credentials (e.g., Dean Kessler). If the title comes **after** the name, use credentials (e.g., David A. Kessler, M.D., Dean, School of Medicine).

4. **Sending the draft of the letter via e-mail:**

Send the electronic file of the letter draft with any attachments to Brenda (e-mail address: bgee@chanoff.ucsf.edu). In the e-mail message (sample below) to which such files are attached:

- a. Please indicate a contact person, who should receive the signed letter for final distribution, along with their phone number and campus mail box number.
- b. If the letter will be sent to individuals as blind courtesy copies (bcc:), please also indicate in the e-mail this information.
- c. Indicate that the letter has indeed been approved by such individual (see #1).
- d. Specify a **true** “need by” date for each document. *If something is extremely time-sensitive, please provide a brief explanation of the circumstances and need for urgency.*
- e. If the drafted letter is a response to routed correspondence assigned “Prepare Reply for Chancellor’s Signature” or “Action,” please indicate in the e-mail message the index number from the Chancellor’s Administrative Records System (CARS).
- f. When more appropriate or convenient, pertinent background materials and enclosures may also be sent via FAX attn.: Brenda at 415-476-9634.



5. **Review by the Office of the Chancellor**

- a. Letters are reviewed for content and format by Office of the Chancellor staff. In cases of extensive revision, the originating department will be contacted for subsequent review of those changes.

- b. After the Chancellor has signed the letter, **it will be returned to the originating department for distribution. The originating department is responsible for sending the original, signed letter plus any blind and courtesy copies (for external correspondence, see #6).** The Office of the Chancellor Administrative Records retains a copy of the signed letter.

6. **Correspondence supplies**

(External correspondence only) Envelopes for external correspondence are available through Campus Life Services – http://www.cas.ucsf.edu/documentsmail/services/dm_services/, and are to be purchased by the originating department to use for letter distribution (5b).