

# Professional Business Associates

## STYLE & REFERENCE MANUAL

### 2019-20 Edition

### Secondary/Post-secondary

Professional Business Associates has established a standard style for all documents that are produced for the Workplace Skills Assessment Program. These styles can be found on the following pages. Please review the styles carefully in preparing the Workplace Skills Assessment Program documents. **Documents must be prepared using the formats specified in this manual. The *Style & Reference Manual* is the final authority for scoring of Competitive Events.**

#### *Formatting Notes*

- **Documents in the *Style & Reference Manual* may not show the correct top margins due to the instruction box at the top of the page.**
- Use left justification of documents unless otherwise indicated.
- Use a 12-point Times New Roman font unless otherwise indicated—including headers and footers.
- Default line spacing should be single spaced.
- Default paragraph spacing before and after should be 0 pt.
- Spacing Guidelines:
  - One or two spaces may be used between the two-letter state abbreviation and the ZIP code.
  - One or two spaces may be used following the end-of-sentence punctuation.
  - One or two spaces may be used after a colon.
  - For a dash, use either the dash key or two hyphens (no spaces before, between, or after).
  - Spacing must be consistent throughout the document.
- When using the abbreviation for Post Office in an inside address, it should be as follows: P.O.
- Numbers one to ten should be spelled out. Use Arabic for 11 and higher. The exception is in medical reports. Arabic is to be used for all ages, dosages and frequencies, lab values, etc. as indicated in AHDI guidelines.
- In a series, the comma before the conjunction is optional.
- Main and subheadings should be keyed in boldface in all documents except in the report format.
- Header and footer margins are .5" unless otherwise indicated.
- All signature lines will be 2".
- Enumerations and bullets are formatted the same way in letters and memos. (See memo for example.)
- All long quotes are indented .5" from the right and left margins.
- For reports: MLA Style should be followed. Bullets should not be used. Enumeration may be used.
- **Please note: The *Style & Reference Manual* is the final authority for scoring Competitive Events.**

# PRODUCTION STANDARDS

## Criteria for the evaluation of computer-generated items

### I. Method of Evaluation

- A. Contestant completion time *will* be used to determine ranking in case of a tie.
- B. The same evaluator determines the document's scoring level and calculates points earned.
- C. Another evaluator calculates and *verifies* total points earned.
- D. Left justification of documents is to be used unless otherwise indicated.
- E. Use a 12-point Times New Roman font unless otherwise indicated.
- F. Default line spacing should be single spaced.
- G. Default paragraph spacing before and after should be 0 pt.
- H. Spacing Guidelines:
  - One or two spaces may be used between the two-letter state abbreviation and the ZIP code.
  - One or two spaces may be used following the end of sentence punctuation.
  - One or two spaces may be used after a colon. For a dash, use either the dash key or two hyphens (no spaces before, between, or after).
- I. Spacing must be consistent throughout the document.
- J. A word cannot have more than one error; for example, the word "bokkepre" contains *only* one error.
- K. Software templates may be used where applicable but must be modified to meet the standards of Professional Business Associates.
- L. A contestant may receive pro-rated credit for only one *partially* completed job.
- M. More than one style may be accepted *if* a model is not shown in the *Style & Reference Manual*.

### II. Scoring/Errors

Five levels of scoring:

0 errors	(100% of assigned point value of each document)
1 error	( 90% of assigned point value of each document)
2 errors	( 70% of assigned point value of each document)
3 errors	( 50% of assigned point value of each document)
4 or more errors	( 0% of assigned point value of each document)

#### **Each occurrence of the following counts as one error:**

1. Misspelling
2. Typographical error
3. Grammatical error
4. Incorrect punctuation
5. Incorrect capitalization
6. Incorrect hyphenation
7. Addition of word(s)—each word added is an error
8. Omission of word(s)—each word omitted is an error
9. Omission of enclosure or attachment notation
10. Omission of reference initials
11. Omission of contestant number and/or job number right aligned in footer (must have both). If all or part is missing, count as one error.
12. Format error: If it is clearly evident that the *Style & Reference Manual* format is *not* followed, 0% of the assigned point value for that document is awarded. If it is clearly evident that *an attempt* was made to follow the *Style & Reference Manual* format, format mistakes will count as one error each.

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**PROFESSIONAL BUSINESS ASSOCIATES (*bold, all caps*)**

**(DS)**

**Agenda (*bold*)**

**(DS)**

**Regular Meeting of Board of Directors (*bold*)**

**(DS)**

**Tuesday, March 29, 20\_\_, 1 p.m. (*bold*)**

**(DS)**

**Board Room, Sixth Floor (*bold*)**

**(QS)**

1. Call to Order—Nancy Wells, Chief Executive Officer

**(DS)**

2. Roll Call—Harvey Rosen, Secretary

3. Reading of the Minutes—Harvey Rosen, Secretary

4. Treasurer’s Report—Julie Smith, Treasurer

5. Other Officer Reports

6. Committee Reports

Accounting—Larry Owens

Social—Bernice Adams

**(SS)**

Fundraising—Kathy Ludwig

**(DS)**

7. Unfinished Business

Dues Increase

**(SS)**

Name Change

**(DS)**

8. New Business

Purchase of Folders

**(SS)**

Anniversary Celebration

**(DS)**

9. Date of Next Meeting

**(DS)**

10. Adjournment

-----  
**Notes:**

- Do *not* enumerate if times are used.
- If times are used, they can be aligned at the colon or left aligned.
- Numbers may be left or right aligned.
- Indents are all ¼” from previous level.
- Do *not* include “Date of Next Meeting” unless a date is provided.

## **Business Plan (*bold*)**

### **Part I—Executive Summary (*bold*)**

The Executive Summary describes the business plan in enough detail to encourage the reader to turn the page and read the information contained in the section that follows. You should pay close attention to what is written in this section. Often the reader will attempt to pass judgment based on what is contained in this part of the plan. With this in mind, the individual must generate a desire in the reader to want to invest and/or participate in the company. This is typically the last segment of the Business Plan to be written.

### **Part II—Description of Proposed Business (*bold*)**

This section describes the company: what the company is, where the idea came from, and other information that will intrigue the reader.

### **Part III—Objectives of the Business (*bold*)**

This section will contain the Mission and Vision statements of the company.

### **Part IV—Proposed Business Strategies (*bold*)**

This section will touch on short-term goals and a long-range plan.

### **Part V—Product(s) and/or Service(s) to be Provided (*bold*)**

The product and/or service to be provided by the company is described in this section. Included in this write-up could be an explanation as to why people will buy the product or service. What is unique about the product in relation to the competition is illustrated. Any special information about the product is shown in detail and a physical representation of the product or service needs to be presented (i.e., prototype or brochure).

### **Part VI—Management and Ownership of the Business (*bold*)**

Create an organizational chart to identify the “key” players in the organization. Included are the company’s officers and their roles and responsibilities. Outside investors and members of the Board of Directors are identified. The descriptions of the company’s officers are to illustrate their competencies and qualifications for filling their roles.

### **Part VII—Marketing Analysis (*bold*)**

This section of the plan describes the target market and why these individuals were chosen as the primary customers. Identifying your business and its competitive edge will be illustrated in this section. The target customer needs to be described. Methods of identifying and attracting customers, the type of sales force, and any specific distribution channels is to be included, as is the company’s pricing policy.

## **Part VIII—Financial Analysis (*bold*)**

This section contains detailed financial information about the organization. The source of start-up cash and major capital expenditures is to be identified. This section will provide a balance sheet as it pertains to the opening day of business. This will define the financial standing and situation when the customer is served.

*(NOTE: The financial analysis section may be less detailed for Secondary students.)*

## **Part IX—Supporting Documentation (*bold*)**

Include any and all information that supports your efforts in other sections. This may include layouts, brochures, flyers, business cards, résumés, product designs, prototypes, etc. These items and pages are not included in the total number of pages.

---

<p><b>BUSINESS PLAN—Second and Subsequent Page Header</b> Name of Company <i>(key the word Page followed by the page number) Page 2</i></p>
---

**ITINERARY (bold)**  
**(DS)**  
**Nancy Wells (bold)**  
**(DS)**  
**April 1-3, 20\_\_ (bold)**

**(QS)**

**Sunday, April 1 (bold)**

**(DS)**

9:02 a.m. Depart Columbus, John Glenn Columbus International Airport (CMH)  
Delta Airlines, Flight 684 (non-stop) (breakfast served)

**(DS)**

12:32 p.m. Arrive New York City, LaGuardia Airport (LGA)

**(DS)**

**Monday, April 2 (bold)**

9:30 a.m. Breakfast appointment with Jane Smith, Chamber of Commerce  
representative, at the Plaza Hotel, 200 Broad Street, Circle Restaurant,  
regarding survey for possible branch in New York City

1:00 p.m. Meeting with Phil Langton at the Waldorf Hotel, Suite #345

3:30 p.m. Appointment with Francis Evans at Citibank, 410 Norway Avenue,  
regarding loan (take last quarter's financial statements)

**Tuesday, April 3 (bold)**

8:00 a.m. Breakfast with Julie Crampton, Office Enterprises

3:00 p.m. Depart New York City, LaGuardia Airport (LGA) Delta Airlines, Flight  
410 (non-stop)

4:15 p.m. Arrive Columbus, John Glenn Columbus International Airport (CMH)

---

**Notes:**

- Times can be aligned at the colon or left aligned.
- Indents are ½" from the left margin.
- Detail information begins at 1.5" from the left margin.
- Each entry is single spaced.

**ITINERARY—Second and Subsequent Page Header**  
**Right Align:** Itinerary of \_\_\_\_  
*(key the word Page followed by the page number) Page 2*

**STATE OF \_\_\_\_\_ (bold)**

**(DS)**

**COUNTY OF \_\_\_\_\_ (bold)**

**(DS)**

**AFFIDAVIT (bold)**

**(DS)**

I, Mary R. Smith, upon oath, state as follows:

**(DS)**

1. On January 8, 20\_\_, Thursday, ..... that I never saw Mr. Jonah with any personnel files

that night.

**(QS)**

\_\_\_\_\_ **(2” line)**

Mary R. Smith

**(DS)**

WITNESS my hand and official seal in the County and State aforesaid this \_\_\_\_\_ day of

**(DS)**

\_\_\_\_\_ **(1½” line), 20\_\_.**

**(QS)**

\_\_\_\_\_ **(2” line)**

Notary Public



**Interrogatories**

Top Margin: 1"

Side Margins: 1"

**IN THE CIRCUIT COURT OF THE  
4TH JUDICIAL CIRCUIT IN AND  
FOR JEFFERSON COUNTY, OHIO (*bold*)**

**(DS)**  
JAN CUMMENT,

**(DS)**  
Plaintiff,

**(DS)**

v.

**(DS)**  
SUSAN LONG,

CASE NO. DA-4444

**(DS)**  
Defendant.

\_\_\_\_\_ / **(2" line)**

**(DS)**

**INTERROGATORIES (*bold*)**

**(DS)**

1. Please state your name and current address.

**(QS)**

2. List all former names and when you were known by those names. State all addresses where you have lived for the past ten (10) years, the dates you lived at each address, your Social Security number, and your date of birth.

**(QS)**

3. Describe any and all policies of insurance.....



13. Please state if you have ever been a party, either plaintiff or defendant, in a lawsuit other than the current matter and if so, state whether you were plaintiff or defendant, the nature of the action, and the date and court in which such suit was filed.

**(QS)**

**(2" line, right aligned)** \_\_\_\_\_  
(Attorney of Record)

**INTERROGATORIES**  
**Second and Subsequent Page Footer**  
Page 2 of 2—Interrogatories  
Contestant Number  
Job Number

**IN THE CIRCUIT COURT OF THE  
4TH JUDICIAL CIRCUIT IN AND  
FOR JEFFERSON COUNTY, OHIO (*bold*)  
(DS)**

JAN CUMMENT,  
(DS)

Plaintiff,

(DS)

v.

(DS)

SUSAN LONG,

CASE NO. DA-4444

(DS)

Defendant.

\_\_\_\_\_ / (2" line)

(DS)

**FINAL JUDGMENT (*bold*)**

(DS)

THIS CAUSE having come on for trial on September 25, 20\_\_\_\_, and in view of the foregoing, it is

ORDERED AND ADJUDGED that Plaintiff JAN CUMMENT shall recover from Defendant SUSAN LONG the total sum of Fifteen Thousand and 00/100 Dollars (\$15,000.00), for all of which let execution issue.

This judgment shall bear interest at the rate of seven percent (7%) per annum until paid in full.

DONE AND ORDERED in Chambers at Fort Lauderdale, Jefferson County, Ohio, this \_\_\_\_\_ day of \_\_\_\_\_ (*1½" line*), 20\_\_\_\_.

(QS)

\_\_\_\_\_ (2" line)

COUNTY JUDGE

Copies furnished:

-----

**DURABLE POWER OF ATTORNEY (bold)**

**(DS)**

**Know All Men By These Presents: (bold)**

**(DS)**

That JUAN CIMMENT, Grantor, has made, constituted, and appointed, and by these presents does make, constitute, and appoint KATHY CIMMENT SMITH his true and lawful attorney-in-fact for him and in his name, place and stead, for the sole and singular purpose of:

**(SS)**

1" right/left indent

executing any and all documents necessary or required to establish or create a joint account between JUAN CIMMENT and KATHY CIMMENT SMITH at Mingo National Bank or any other banking or savings and loan institution, and further, KATHY CIMMENT SMITH is further empowered to make, do, and transact any and every kind of business of whatsoever kind and whatsoever nature on behalf of Grantor,

**(DS)**

giving and granting unto KATHY CIMMENT SMITH, said attorney-in-fact, full power and authority to do and perform all and every act and thing whatsoever requisite and necessary.

IN WITNESS WHEREOF, I have hereunto set my hand and seal this \_\_\_\_ day of

\_\_\_\_\_ (1½" line), 20\_\_.

**(QS)**

\_\_\_\_\_ (2" line)

Notary Public

Signed and sealed in the presence of

**(QS)**

\_\_\_\_\_ (2" line) (2" line, right aligned) \_\_\_\_\_

Witness

JUAN CIMMENT

**(QS)**

\_\_\_\_\_ (2" line)

Witness

Durable Power of Attorney  
of Juan Cimment

**(DS)**

Page 1 Initials \_\_\_\_\_ (this line is 10 pt. font size, 1" line)

**Letter**  
First Page Top Margin: 2"  
Second and Subsequent Page Top Margin: 1"  
Side Margins: 1"  
Use open punctuation

November 16, 20\_\_ (use current date unless otherwise specified)

**(QS)**

Mr. Larry Brown, President  
Brown Office Supplies  
1101 Hortez Road  
Chicago, IL 60601-1234

**(DS)**

Dear Mr. Brown

**(DS)**

ACCOUNT BALANCE (if no subject line, then only **DS** after salutation)

**(DS)**

Your current balance on the enclosed invoice is long overdue. We are planning to turn your records over to a collection agency soon.

It is important that you contact our accounting department immediately to arrange an easy payment plan that will be satisfactory to both parties.

Please contact Roger Owens, your account representative, at 601-555-0014.

**(DS)**

Sincerely

**(QS)**

Nancy Wells  
Chief Executive Officer

**(DS)**

xx

**(DS)**

Enclosure(s)

**(DS)**

c Roger Owens  
Harvey Rosen

**LETTER—Second and Subsequent Page Header**  
At left margin: Name of Addressee or Company  
(key the word *Page* followed by the page number) Page 2  
Date  
**Spacing of Header Information: SS**

**Marketing Plan (bold)****Part I—Synopsis or Mini-plan (bold)****(DS)**

This section contains an Executive Summary. An Executive Summary defines and illustrates the content of the Marketing Plan. It should be no more than one page in length so as to allow the reader to determine his/her interest in reading the balance of the plan.

**Part II—Company Goals (bold)****(DS)**

Included in this part of the Marketing Plan are the objective and/or goals established for the organization. There are items that will generally result in and/or produce outcomes for the company to achieve.

**Part III—Description of Customers and Their Needs (bold)****(DS)**

This section should define the target market for your product/service. In order to sell products/services, marketing experts must understand the needs of consumers. Having a clear understanding of customer motivations will provide a clear direction for the overall marketing plan. Your market research should include the gathering of demographic information.

In the global market other considerations include communication, traditions and customs, and buying habits. What does your research reveal about your target market?

**Part IV—Description of Pricing Strategy (bold)****(DS)**

Pricing involves many factors. The marketing plan must include your rationale for price setting. Included in this section will be all the elements affecting the production process. Differentiate between fixed and variable costs as well as the break-even point. Profit margin should be established in this section.

**Part V—Competition (bold)****(DS)**

In this section you provide a clear picture of the overall market. How many other firms/businesses offer the same product/service? What is your plan to win over the customer base when they have a clear choice between your offerings and the other firms/businesses? Is there a place for your business?

**Part VI—Marketing Mix (bold)****(DS)**

A good marketing plan answers questions regarding the promotion of the product/service. Will it appeal to buyers? How much should it cost? How does the seller get information distributed to potential buyers? Where should the product/service be sold? How does this product/service appeal to consumers in other countries? This section should include the factors of price, promotion, and location.

**Part VII—Economic, Social, Legal, and Technological Trends (*bold*)**  
**(DS)**

Key factors in these areas have a dramatic effect on the success or failure of a business. This section should include your research findings as they relate to the product/service you are marketing. Make sure your findings relate specifically to your marketing plan.

**Part VIII—Human Resource Requirements (*bold*)**  
**(DS)**

What is the organizational structure of your business? This section should include an organization chart that defines management, supervision, and all levels of employment within your organization as well as job descriptions, required education and skills, and work experience requirements.

**Part IX—Marketing Timeline (*bold*)**  
**(DS)**

No marketing plan can be implemented without a timeline for yourself and your employees. Include timeframes for implementation of the specific strategies included in your Marketing Plan. Detail employee responsibilities for the items in the timeframe. Timeframes can be as short as one week or as long as one year.

**Part X—Methods of Measuring Success (*bold*)**  
**(DS)**

How will you determine the success of your marketing plan and your business?

---

<p style="text-align: right;"><b>MARKETING PLAN</b> <b>Second and Subsequent Pages</b> Top Margin: 1" Side Margins: 1" <i>Header:</i> Name of Company <i>(key the word Page followed by the page number)</i> Page 2</p>
---

## SOAP Medical Transcription Form

Top Margin: 1”

Side Margins: 1”

Patient Name Line: 2.5" from top

Second Page Text begins: 1" from top

Patient Name:

PCP: *(Right align Preferred Care Provider)*

Date of Birth: mm/dd/yyyy

Date of Exam: mm/dd/yyyy

Sex: *(Right align gender)*

**(DS)**

**SUBJECTIVE:** The patient is a 14-year-old female who fell from a horse on July 1, 20\_\_ . She suffered a fracture of the right inferior pubic ramus.

**(DS)**

**OBJECTIVE:** Blood pressure 150/84, pulse 76 with an occasional irregular beat. Exam is otherwise negative.

**(DS)**

**ASSESSMENT:** 1. Nondisplaced fracture, right pubic ramus.  
2. Intense swelling.  
3. Severe lower leg pain.  
4. Hypertension.

**(DS)**

**PLAN:** The patient can discontinue crutches when swelling has decreased and there is no longer a limp associated with pain.

**(QS from last line of report to signature line.)**

**(2” line, right aligned)** \_\_\_\_\_

Gene Loghlin, M.D.

**(DS)**

GL:xx

**(DS)**

D: mm/dd/yyyy *(key date of dictation)*

T: mm/dd/yyyy *(key date of recorded transcription)*

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### SOAP—Second and Subsequent Pages

**Left Aligned:** Patient Name:

Doctor’s Name:

Exam Date:

***(at top left margin, key the word Page followed by the page number)*** Page 2

Spacing for paragraphs as shown above.

**Spacing from heading to body of report: DS**

## HPIP Medical Transcription Form

Top Margin: 1"

Side Margins: 1"

Patient Name Line: 2.5" from top

Second Page Text begins: 1" from top

Patient Name:

PCP: *(Right align Preferred Care Provider)*

Date of Birth: mm/dd/yyyy

Date of Exam: mm/dd/yyyy

Sex: *(Right align gender)*

**(DS)**

**HISTORY OF PRESENT ILLNESS:** The patient is a 14-year-old female who fell from a horse on July 1, 20\_\_\_. She suffered a fracture of the right inferior pubic ramus.

**(DS)**

**MEDICATIONS:** 2 Advil every two hours as needed for pain and multivitamins with iron.

**(DS)**

**PHYSICAL EXAMINATION:** Blood pressure 150/84, pulse 76 with an occasional irregular beat. Exam is otherwise negative.

**(DS)**

**IMPRESSION:** Nondisplaced fracture, right pubic ramus. Intense swelling. Severe lower leg pain. Hypertension.

**(DS)**

**PLAN:** The patient can discontinue crutches when swelling has decreased and there is no longer a limp associated with pain.

**(QS from last line of report to signature line.)**

**(2" line, right aligned)** \_\_\_\_\_

Gene Loghlin, M.D.

**(DS)**

GL:xx

**(DS)**

D: mm/dd/yyyy *(key date of dictation)*

T: mm/dd/yyyy *(key date of recorded transcription)*

### HPIP—Second and Subsequent Pages

**At top left:** Patient Name:

Doctor's Name:

Exam Date:

***(at top left margin, key the word Page followed by the page number)*** Page 2

Spacing for paragraphs as shown above.

**Spacing from heading to body of report: DS**



**MEMORANDUM (16 pt. bold font)****(DS)****TO:** Tom Carlson, Julie Smith, Roger Meyer, Edna Renick**(DS)****FROM:** Harvey Rosen, Financial Services**(DS)****CC:** Nancy Wells, CEO *or* Chief Executive Officer**(DS)****DATE:** September 9, 20\_\_**(DS)****SUBJECT:** Mandatory Payroll Deductions**(DS)**

It has come to my attention that some employees believe that payroll deductions are optional. Please share the following information with the employees in your respective departments. It can be found on page 23 of our Personnel Manual.

Professional Business Associates is required by law to make certain deductions from your paycheck each time one is prepared. Among these are your federal, state, and local income taxes and your contribution to Social Security as required by law. These deductions will be itemized on your check stub.

I've attached the Compensation section from our HR Manual for your reference. Highlights from this section are listed below.

1. Direct Deposit
2. Payroll Deadlines
3. Making Changes to Tax Withholdings (W-4)
4. W-2 Form by January 30 of each year, current and former employees are provided W-2 Form for income tax purposes

If any of your employees have questions, please let me know; and I'll be more than happy to address them on an individual basis. Thank you for your time and attention to this matter.

**(DS)**

xx

**(DS)**Enclosure(s) or Attachment(s) (*use whichever is appropriate, if any*)**MEMORANDUM—Second and Subsequent Page Header****At left margin:** Name of Recipient**(at top left margin, key the word Page followed by the page number)** Page 2

Date

**Spacing of Heading Information:** SS



**NEWS RELEASE (bold)**  
**(DS)**

From Nancy Wells  
5454 Cleveland Avenue  
Columbus, OH 43231-4021  
614-555-5555

**(DS)**  
Release June 1, 20\_\_

**(QS)**

**PROFESSIONAL BUSINESS ASSOCIATES EXPANDS (bold)**

**(QS)**

Professional Business Associates is expanding its facilities by adding another 65,000 square feet of office space. The renovations should be completed by June 15, 20\_\_. The expansion project, headed by Myrtle Warden, is anticipated to cost approximately \$15.5 million. An additional 350 employees will be hired over the next two years.

This expanded facility will allow Professional Business Associates to offer many more services, especially in the area of training on specially designed software packages. An open house is tentatively planned for July 5. More details will be forthcoming.

(more ...)

---

**Notes:**

- Double space below the last line of the document, center, and insert the symbols # # # (include spaces between number symbol).
- For a one-page news release, omit (more ...) and follow directions above.

**NEWS RELEASE—Second Page Header**  
**(Page number align right) 2**  
**Do not put the word “Page” in front of the page number.**

## OUTLINE SPACING *(bold)*

(QS)

### I. VERTICAL SPACING

**(DS)**

- A. Title of Outline
  - 1. Two-inch top margin
  - 2. Followed by three blank lines
- B. Major Headings and Subheadings
  - 1. All major headings followed by double space
  - 2. All subheadings single spaced

**(DS)**

### II. HORIZONTAL SPACING

**(DS)**

- A. Title of Outline Centered Over Line of Writing
- B. Major Headings and Subheadings
  - 1. Identifying Roman numerals at left margin or aligned on periods
  - 2. Identifying letters and numbers for each subsequent level of subheading aligned below the first word of the preceding heading

---

**Notes:**

- If complete sentences are used in outlines, they should be followed by an appropriate mark of punctuation.
- Do not use automatic numbering.
- Define a New Multilevel list using the following settings:

Level #	Number alignment	Aligned at	Text indented at
1 (I)	Left	0"	0.25"
2 (A)	Left	0.25"	0.5"
3 (1)	Left	0.5"	0.75"

- Define New List Style settings for each of the three levels to be Times New Roman, Regular, 12 pt. font.

**Report**  
(MLA Style)  
Top Margin: 1"  
Side Margins: 1"  
Spacing of Body: DS

Julie Smith (*Sender's Name*)

(DS)

Roger Meyer (*Recipient's Name*)

(DS)

Marketing Department (*Name of Recipient's Department or Job Title*)

(DS)

8 October 20\_\_ (*use current date in military style (as shown)*)

(DS)

Report Format

(DS)

*NOTE:* The title is typed in Title Case (not all caps) and is not bold.

Whether written for personal or business use, a report should present a message that is well organized, stated simply, and clear in meaning. A report that does not meet these criteria reflects a lack of planning and preparation.

Planning a Report

Three steps should be taken in planning a report. Selecting the topic is not merely the first step, but also the most important one. It is vital that you choose a topic in which you have sufficient interest to do the necessary related reading and research (LePoole 197).

Preparing the Report

The following three steps should be utilized in preparing the report:

1. Look for data and authoritative statements.
2. Prepare a rough draft of the report, organizing the data into a series of related paragraphs. A sentence that follows enumerated items within the same paragraph should begin at the left margin.
3. Read the rough draft carefully.

Whether the report is typed or printed, it should be neat and arranged in proper format. A neat report presented in an orderly style makes an immediate positive impression on the reader.

-----

**Report—First Page and Subsequent Pages**  
(*Right margin header—Sender's Last Name and Page #*) Smith 2

**BUSINESS PROFESSIONALS OF AMERICA (*bold*)**  
**(DS)**  
**National Leadership Conference (*bold*)**

**(QS)**

Students from Johnson High School will attend the 20\_\_ National Leadership Conference of Business Professionals of America in New York, New York, April 22-April 26, 20\_\_\_. The theme of the conference is “Destination: Success.” During the five-day conference, the students will participate in skills assessments, workshops, and an election campaign. Also, they will be enjoying some of the sights in the New York area.

More than 6,000 students nationwide will attend the conference as top representatives from the approximately 55,000 national members.

**SALARY CHART (bold)**  
**(DS)**  
**Administrative Support Department (bold)**  
**(QS)**

<b>Position</b>	<b>Current Salary</b>	<b>Percent Increase</b>	<b>Amount Increase</b>	<b>New Salary</b>
Accountant	\$26,000.00	6.5	\$1,690.00	\$27,690.00
Accounting Clerk	19,000.00	5.0	950.00	19,950.00
Administrative Assistant	23,000.00	5.5	1,265.00	24,265.00
Data Entry Clerk	16,500.00	4.5	742.50	17,242.50
Data Processing Programmer	23,500.00	6.0	1,410.00	24,910.00
Executive Assistant	25,000.00	6.5	1,625.00	26,625.00
Office Assistant	16,000.00	0.5	80.00	16,080.00
Office Specialist	19,000.00	5.0	950.00	19,950.00
<b>Total</b>	<b>\$168,000.00</b>		<b>\$8,712.50</b>	<b>\$176,712.50</b>

-----  
**Notes:**

- Titles and subtitles should be boldfaced.
- Column headings may be centered over column or blocked at left of column. Column headings should be boldfaced. For two-line column headings, align headings at bottom of cell.
- Borders are optional unless otherwise stated.
- Always align contents to the bottom of the cell.
- Use currency style as shown. Currency style: Dollar signs on 1<sup>st</sup> and total row ONLY (if applicable).
- All columns containing numbers should be right or decimal aligned.
- All columns containing text should be left aligned.
- The body of the table may be single or double-spaced.
- Tables formatted as an individual document should be centered horizontally and vertically. Tables within a document should be centered horizontally unless otherwise indicated. Tables within a document should be formatted with a DS before columns headings and after the table.
- Total line should be boldfaced.

**SALARY CHART (bold)**  
**(DS)**  
**Administrative Support Department (bold)**

(QS)

Underline column headings and DS after heading.

<u>Position</u>	<u>Current Salary</u> (DS)	<u>Percent Increase</u>	<u>Amount Increase</u>	<u>New Salary</u>
Accountant	\$26,000.00	6.5	\$1,690.00	\$27,690.00
Accounting Clerk	19,000.00	5.0	950.00	19,950.00
Administrative Assistant	23,000.00	5.5	1,265.00	24,265.00
Data Entry Clerk	16,500.00	4.5	742.50	17,242.50
Data Processing Programmer	23,500.00	6.0	1,410.00	24,910.00
Executive Assistant	25,000.00	6.5	1,625.00	26,625.00
Office Assistant	16,000.00	0.5	80.00	16,080.00
Office Specialist	<u>19,000.00</u>	5.0	<u>950.00</u>	<u>19,950.00</u>
<b>Total</b>	<b>\$168,000.00</b>		<b>\$8,712.50</b>	<b>\$176,712.50</b>

**Notes:**

- Titles and subtitles should be boldfaced.
- Column headings may be centered over column or blocked at left of column. Column headings should be boldfaced. For two-line column headings, align headings at bottom of cell.
- Borders are optional unless otherwise stated.
- Always align contents to the bottom of the cell.
- Use currency style as shown. Currency style: Dollar signs on 1<sup>st</sup> and total row ONLY (if applicable). Single rule (underline) above the total numbers (if applicable).
- All columns containing numbers should be right or decimal aligned.
- All columns containing text should be left aligned.
- The body of the table may be single or double-spaced.
- Tables formatted as an individual document should be centered horizontally and vertically. Tables within a document should be centered horizontally unless otherwise indicated. Tables within a document should be formatted with a DS before columns headings and after the table.
- Total line should be boldfaced.



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**Notes:**

- Roman numerals can be left or right aligned.
- Page numbers should be right aligned with tab leaders.
- Indents/tab stops start at the left margin and are ½" from the previous level.

*(approximately 3.5” from top 14 pt. bold)*  
**Research Paper Title**

*(approximately 5” from top 14 pt. bold)*  
**Contestant Number**

*(approximately 8.5” from top 14 pt. bold)*  
**Name of Contest**  
**(DS)**  
**Date**

**Works Cited**

Top Margin: 1"

Side Margins: 1"

Spacing of Body: DS

*(Right margin header—Sender’s Last Name & Page #)* Smith 13

Works Cited

(DS)

Cain, Kevin. "The Negative Effects of Facebook on Communication." *Social Media Today RSS*

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**Notes:**

- The marking “---” is used to indicate a repeat in authors.
- List alphabetically by author. If no specific author referenced, alphabetize by first letter of first word of work cited.
- Use ½” hanging indent.

**WORKS CITED—Second and Subsequent Page Header**  
*(Right margin header—Sender’s Last Name & Page #)* Smith 2

## Two-Letter State Abbreviations

STATE, DISTRICT, OR TERRITORY	TWO-LETTER ABBREVIATION	STATE, DISTRICT, OR TERRITORY	TWO-LETTER ABBREVIATION
Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
Arizona	AZ	Nevada	NV
Arkansas	AR	New Hampshire	NH
California	CA	New Jersey	NJ
Colorado	CO	New Mexico	NM
Connecticut	CT	New York	NY
Delaware	DE	North Carolina	NC
District of Columbia	DC	North Dakota	ND
Florida	FL	Ohio	OH
Georgia	GA	Oklahoma	OK
Guam	GU	Oregon	OR
Hawaii	HI	Pennsylvania	PA
Idaho	ID	Puerto Rico	PR
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Maryland	MD	Virgin Islands	VI
Massachusetts	MA	Virginia	VA
Michigan	MI	Washington	WA
Minnesota	MN	West Virginia	WV
Mississippi	MS	Wisconsin	WI
Missouri	MO	Wyoming	WY

## Rules for Alphabetic Filing (ARMA)

The following seven rules provide consistency in simplified filing.

1. Each filing unit in a filing segment is to be considered. This includes prepositions, conjunctions, and articles. The only exception is when the word **The** is the first filing unit in a filing segment. In this case, **The** is the last filing unit. Spell out all symbols (e.g., &, \$, #) and file alphabetically.
2. Alphabetize by arranging files **unit-by-unit** and **letter-by-letter** within each unit.
3. File “nothing before something.” File single unit filing segments before multiple unit filing segments.
4. Ignore all punctuation when alphabetizing. This includes periods, commas, dashes, hyphens, apostrophes, etc. Hyphenated words are considered one unit.
5. Arabic and Roman numbers are filed sequentially before alphabetical characters. All Arabic numerals precede all Roman numerals.
6. Acronyms, abbreviations, and radio and television station call letters are filed as one unit.
7. File under the most commonly used name or title. Cross-reference under other names or titles, which might be used in an information request.

### Personal Names

1. Simple Personal Names  
Use the last name (surname) as the first filing unit. The first name or initial is the second filing unit. Subsequent names or initials are filed as successive units.
2. Personal Names with Prefixes  
Surnames that include a prefix are filed as one unit whether the prefix is followed by a space or not. Examples of prefixes are: D', Da, De, Del, De la, Della, Den., Des, Di, Du, El, Fitz, L', La, Las, Le, Les, Lo, Los, M, Mac, Mc, O', Saint, St., Ste., Te, Ten, Ter, Van, Van de, Van der, Von, Von der.
3. Personal Names with Personal and Professional Titles and Suffixes  
Suffixes are not used as filing units except when needed to distinguish between two or more identical names. When needed, a suffix is the last filing unit and is filed as written, ignoring punctuation. Examples of suffixes are: Jr., III.
4. Personal Names which are Hyphenated  
Ignore the hyphen and file the two words as one unit.
5. Pseudonyms and Royal and Religious Titles  
Pseudonyms are filed as written. Personal names that start with a royal or religious title and are followed by **only** a given name(s) are filed as written.
6. Foreign Personal Names  
If the surname is identifiable, file the name as any other personal name is filed. If there is a question about the surname, use the last name as the first filing unit and make a cross-reference from the first name.

## 7. Nicknames

When a person commonly uses a nickname as a first name, file using the nickname. Cross-reference from the given name only if necessary.

## Business Names

When the same filing segment is applicable to more than one location, filing order is determined by an identifying location. In the case of banks, unions, etc., this location may be a branch, local number, post, etc. For most businesses, it will be an address. When using an address, cities are considered first, followed by states or provinces, street names, house number, and then building number, in that order.

## Address Arrangement

When the first units of street names are written as numbers, the street names are considered in ascending numeric order and placed together before alphabetic street names.

Street names with compass directions are considered as written. Numbers after compass directions are considered before alphabetic names (for example: East 8<sup>th</sup>, East Main, Franklin, SE Eighth, Southeast Eighth, etc.).

If a filing unit within an address is not necessary for identification, it does not have to be used.

## Business and Organization Names

1. Business and organization names are filed as written, using the business letterhead or trademark as a guide. Names with prefixes follow the example for personal names with prefixes.

Note: When necessary to ensure information retrieval, cross-reference between acronyms and the complete name.

2. Subsidiaries of businesses will be filed under their own name with a cross-reference to the parent company, if needed.
3. Location words in business names will follow the standard rule that each word/filing unit is treated as a separate filing unit.
4. Compass terms in business names: Each word/unit in a filing segment containing a compass term is considered a separate filing unit. If the term includes more than one compass point, treat it as it is written. Establish cross-references as needed.

## U.S. Governmental/Political Designations

When filing governmental/political material, the name of the major/governmental/political entity is filed first, followed by the **distinctive** name of the department, bureau, etc.

This rule covers all governmental and political divisions, agencies, department, committees, etc. from the federal to the state, county/parish, city, district, and ward level.

*(examples on next page)*

## EXAMPLES:

### Federal

The name of the major governmental entity, United States Government, is filed first followed by the distinctive name of the department, office, service, bureau, etc. For example, Labor is the distinctive part of the name Department of Labor, so it should be filed as Labor Department (of).

United States Government  
Agriculture Department (of)  
Natural Resources Office (of)  
Forestry Service

United States Government  
Environmental Protection Agency

### State and Local

State, county, parish, city, town, township, and village governmental/political divisions are filed by their distinctive names. The words “county,” “city” “department” etc., if needed and as appropriate, are added for clarity and are considered filing units.

Ohio State (of)  
Transportation Department (of)  
Motor Vehicles Division (of)

Note: If “of” is not part of the official name as written, it is not added.

### Foreign Governments

The distinctive name translated into English is the first filing unit. If needed, the balance of the formal name of the government forms the next filing unit(s). Divisions, departments, and branches follow in sequential order, reversing the written order where necessary to give the distinctive name precedence in the filing arrangement.

States, colonies, provinces, cities, and other divisions of foreign governments are filed by their distinctive or official names as translated into English. Cross-reference written name to official native name where necessary.

#### **Note:**

- *The World Almanac* and *Book of Facts* are excellent references for the translation of foreign names into English and for clarification of relations between governments. Another source is the book *Counties, Dependencies, and Areas of Special Sovereignty* published by U.S. Dept. of Commerce, National Bureau of Standards, Institute for Computer Sciences & Technology, Gaithersburg, MD 20899.

## Professional Business Associates

### Organizational Chart and Company Information

Professional Business Associates develops and sells software, hardware, and services. The services provided are:

1. Systems analysis
2. Software development and design
3. Marketing
4. Training development
5. Hardware and software sales

This large corporation has a branch office in the capital city of each membership state. The corporate headquarters is located at 5454 Cleveland Avenue in Columbus, OH 43231-4021, and has 200+ employees. Management includes:

Chief Executive Officer	Nancy Wells
Financial Services Department	Harvey Rosen
Information Technology Department	Tom Carlson
Human Resources Department	Julie Smith
Marketing Department	Roger Meyer
Administrative Support Department	Edna Renick

Chief Executive Officer				
Financial Services	Information Technology	Human Resources	Marketing	Administrative Support
1. Administrative Assistant 2. Data Entry Clerk 3. Payroll Clerk 4. Accounting Clerk 5. Database Assistant 6. Spreadsheet Specialist 7. Accountant 8. Financial Analyst	1. Data Entry Clerk 2. Database Specialist 3. Information Processing Assistant 4. Administrative Assistant 5. Programmer 6. Software Engineer 7. PC Servicing/Troubleshooting 8. Network Administrator 9. Digital Media Specialist 10. E-commerce Specialist 11. Website Developer	1. Human Resources Assistant 2. Information Processing Assistant 3. Administrative Assistant 4. Medical Support Assistant 5. Insurance Benefits Clerk 6. Management Assistant 7. Payroll Specialist 8. Wellness Coordinator	1. Information Processing Assistant 2. Administrative Assistant 3. Desktop Publisher 4. Graphic Design Assistant 5. Desktop Publishing/Graphic Assistant 6. International Business Coordinator 7. Website Liaison 8. Management Assistant 9. Small Business Liaison 10. Research Assistant	1. Administrative Assistant 2. Information Processing Specialist 3. Computer Applications Specialist 4. Desktop Publishing Assistant 5. Legal Research Assistant 6. Graphic Design Assistant 7. Management Assistant



## Proofreader's Marks

SYMBOL	REVISION	EDITED COPY	CORRECTED COPY
	Transpose letters or words.	to efficiently keyboard for a long period	to keyboard efficiently for a long period
	Delete copy.	Send <del>two</del> or three copies	Send three copies
	Cross the misstroke and write correct letter above.	the majr problem	the major problem
	Change copy as indicated.	The copy <del>will be sent</del> was mailed	The copy was mailed
	Close up horizontal space.	the letter head	the letterhead
	Insert copy (caret).	When receive the copy edited	when we receive the edited copy
	Insert period.	Donald P. Miller	Donald P. Miller
	Insert question mark.	Are you sure ? / I am.	Are you sure? I am.
	Insert exclamation point.	No ! / I refuse	No! I refuse....
	Insert punctuation mark.	Mary's comment was, "The project must be completed by 1:30, otherwise, it will be of no value."	Mary's comment was, "The project must be completed by 1:30; otherwise, it will be of no value."
	Insert space.	The text on the shelf	The text on the shelf
	Use lowercase letters.	<del>THE MAIN</del> Event lc	The Main Event
	Capitalize single letters or words.	<del>eastern; pacific</del>	Eastern; Pacific
	Double-space. (Leave one blank line.)	<del>DS</del> Dear Miss Smith Thank you for	Dear Miss Smith Thank you for....
	Single-space. (Leave no blank line.)	<del>SS</del> We are happy to announce that	We are happy to announce that .....
	Quadruple-space. (Leave three blank lines.)	<del>QS</del> May 1, 20-- John J. Smith, CEO	May 1, 20-- John J. Smith, CEO
	Let it stand; ignore correction.	<del>stet</del> Our proposed seminar will likely be held	Our proposed seminar will likely be held.
	Move copy in the direction of the bracket.	Sincerely yours John Jones Manager Bf	Sincerely yours (QS) John Jones Manager Bf
	Begin new paragraph.	at the meeting. Beginning in June our next	....at the meeting. Beginning in June our next....
	Underline or italicize.	All requests <u>must be</u>	All requests <u>must be</u>
	Align copy.	1. Call to order //2. Approval of minutes	1. Call to order 2. Approval of minutes
	Spell out word or number.	1945 North Water St. sp	1945 North Water Street
	Insert hyphen.	His mother-in-law	His mother-in-law

# Graphic Standards and Branding Guidelines

The logo for Business Professionals of America has been carefully researched from a legal standpoint. The name is registered and the logo design protected by copyright and service mark. In order to obtain the maximum benefit from the image package, it must be used consistently throughout the organization — locally, regionally, statewide and nationally. Additionally, the tagline, Giving Purpose to Potential, is registered and protected by copyright.

## Name Identification

State Associations will be Business Professionals of America, (State) Association. Chapters will be identified as Business Professionals of America, (School Name) Chapter. The complete name will be spelled out in all written materials. The acronym BPA may be used in text once the complete name has been used.

## The Tagline

The purpose of the organization’s tagline is to serve as a linking device between our organization and our name. The official tagline is: Giving Purpose to Potential. To ensure that there is a clear communication of Business Professionals of America, the tagline may be used with the logo for printed pieces. However, this is not a requirement for use of the logo.

- The tagline can be used on one line or two lines, depending on the size and shape of the graphic piece.
- The tagline should appear in red when used with the primary logo, and in blue when used in conjunction to the banner logo. In other cases, where the printed piece is a one-color item, all art printed shall appear in white, black, grey, red or navy.
- The type style to be used for the tagline is Century Gothic or Arial, upper, and lower case, when used outside of the logo lockup.
- The tagline cannot appear in bold or italic.
- The tagline cannot be underlined.

## The Logo

- The primary logo of Business Professionals of America includes the “bpa” mark on the left, a line separator and the words “Business Professional of America” spelled out on the right.
- The logo may include the official tagline: Giving Purpose to Potential, however it is not required.
- When the tagline is included with the primary logo, it should appear and align under the word “America”.
- Minimum distance kept around the logo should remain proportionate to the size of the logo based off of the circumference of the rounded/circle shape of each letter in the “bpa” mark.
- The full color logo must not be used on a contrasting color background or over top of a photo image. In these cases, the logo used should be a one-color treatment for visibility and clarity.
- The logo is not to have the mark and words stacked.
- The mark cannot be one full color and the words a different full color — it must follow proper use when in full color format.
- When in full color format, the text cannot deviate from the primary logo color scheme.
- The full color, primary logo must include the line separator.
- The one-color version can only be printed in blue, red, black, gray or white.

- If two colors are used, they must be the approved blue and red colors from the primary color palette. No other two-color version is permitted.
- Usage of the mark without wording is permitted in some formats, including in social and other digital media.
- The mark can appear with or without a circle encompassing it.
- When using the mark within the circle to identify a state or chapter, the name is not to appear inside the circle and/or above the “bpa” mark. States and chapters are to appear under the mark within the circle and the font color used should be the approved PMS color blue from either the primary or secondary color palette.

There is a primary and a secondary color palette identified for the corporate color scheme as it relates to the logo of Business Professionals of America. The color scheme for the full color logo is blue and red. The two-color logo is to be used whenever your budget allows, using PMS ink. (See below)

- The one-color version of the logo should ideally be navy blue; if your budget for the printed publication does not allow for a colored ink, black, gray or white are also acceptable.
- When the logo is printed in full color with the tagline, the tagline must be red.
- If the logo is printed in one color (blue, red, black, gray or white), the tagline (if used) must be printed in the same color.

To reduce the occurrence of inconsistent color, all printed pieces are to be printed with Pantone Matching System (PMS) ink. The official PMS colors are to be used in every case except in full-color situations. The PMS colors are as follows:

#### **Primary Color Palette**

Blue: PMS 302      Red: PMS 7627      Gray: PMS Warm Gray 1      Tan: PMS 466

#### **Secondary Color Palette**

Blue: PMS 2965      Red: PMS 7186      Yellow: PMS 7401      Light Blue: PMS 658

When creating art work for computer web pages, computer presentations, etc., the color compositions for RGB (Red, Green, Blue) may be needed if you are composing in that format. They are as follows:

#### **Primary Color Palette**

Blue: 0/59/92      Red: 171/44/41      Gray: 214/209/202      Tan: 198/170/118

#### **Secondary Color Palette**

Blue: 0/38/62      Red: 200/16/46      Yellow: 245/225/164      Light Blue: 169/196/227

### **Typography**

The official type design of Business Professionals of America are non-system fonts that include Josefin Sans Bold, and Neutraface Text Book. However, system fonts have also been approved for use in cases when states and chapters do not have access to the official non-system fonts. To complement the Business Professionals of America logo, Arial or Century Gothic may be used. Both fonts offer many variations, i.e., bold, light and italic. Suggested usage includes:

- Arial Bold or Century Gothic Bold, Arial Bold Italic or Century Gothic Bold Italic, should be used for headlines on corporate publications, exterior/interior signage, banners and posters.
- Arial or Century Gothic are to be used for body copy on all Business Professionals of America publications whether on the local, state or national level.

## **Official Emblem**

The Business Professionals of America emblem is one of long-standing tradition. The emblem is to be used for ceremonial purposes only. The emblem may be used for the Emblem Building Ceremony and portions of the Opening and Closing Ceremonies at the local, state or national level.

## **Ambition. Leadership. Sociability. Poise.**

The four points of the BPA shield stand for Ambition, Leadership, Sociability and Poise. The shield itself stands for honor and dignity and the importance of business in America. The stripes represent education, citizenship, loyalty, patriotism, competency and dependability. The bar represents the service provided by employees in business occupations. The quill and inkwell represent the stability of business occupations through the ages and the torch represents worthy goals.

The official colors of the shield are navy blue, red and tan.

## **Printing Tips**

### **Do:**

- Follow the graphic standards printed in this booklet.
- Contact the National Center if there is the slightest doubt as to the procedures outlined.
- Use the artwork provided for reproduction; additional artwork is available from the National Center at cost.
- Use the corporate logo and tagline as outlined in the official Brand Guide of the National Center.
- Use the corporate colors — PMS colors and numbers.

### **Don't:**

- Substitute the emblem for the corporate logo.
- Substitute other colors for the corporate colors.
- Alter the design of the corporate logo or official emblem in any manner.
- Alter, add or delete any part of the logo, tagline or emblem.

Note: Color separations and complete graphic standards are available from the National Center.

## **Home Page/Multimedia Graphic Standards**

The graphic standards for the printed page should be observed in Internet, website or multimedia presentation creation, whenever possible.

The rules for official logo colors should be observed. If PMS colors or RGB formulas are not available options with your software and only preset color choices are available, then the nearest approximations to the official logo colors should be chosen.

If animation is employed, the logo may change or evolve during animation, but its final state should be either the one or two-color version of the logo without any distortion or color change.

Third dimension or depth may be added to the logo if it does not greatly distort the logo or change its color.

As in the standards for the printed page, subdued colors which convey a “business look” should be used.

# Copyright & Fair Use Guidelines

## Intellectual Property Guidelines

### General Information About These Guidelines

- The U.S. Copyright Act provides that only the copyright holder has the right to reproduce, distribute, display, perform, or make derivatives of a copyrighted work.
- An exception to this rule is called “fair use.” Four factors courts use to decide whether an unauthorized use of a copyrighted work is “fair use” (and therefore permitted even though the copyright owner has not granted permission) are: (1) **the purpose and character of the use**, *i.e.*, if the work is used only for educational purposes, it is *more* likely to be considered fair use, and if the use of the work is transformative (not mere copying), it is *more* likely to be considered fair use; (2) **the nature of the copyrighted work itself**, *i.e.*, if the work is published, use of that work is *more* likely to be deemed fair use because the author has had the opportunity to control its first publication, also if the work is primarily factual in nature, then use of it is *more* likely to be deemed fair use; (3) **the amount of the copyrighted work used**, *i.e.*, if a small amount of the copyrighted work is copied, then it is *more* likely to be considered fair use; and (4) **whether the use of the copyrighted work has a significant effect on the market for the work**, *i.e.*, if the use would not replace sales of the work that would otherwise occur, it is *more* likely to be deemed fair use.
- Educational use is not *automatically* fair use, so you should follow the guidelines below to ensure your use does not violate a copyright owner’s rights.
- Always ask yourself whether something that is not your own could be copyright protected – if it is music, a movie clip, or a photo created by someone else, it could be.
- Any materials you use in your presentation must have been legitimately acquired, meaning that whatever source the materials are taken from cannot themselves have been engaging in copyright infringement (for instance, use of a video that was clearly videotaped on a phone in a movie theater and then posted on the internet would not be advisable, as that taping in the movie theater and posting of the video on the internet likely violated the rights of the owner(s) of the copyright to the movie).
- Works published before the specific date of January 1, 1923, are in the public domain, so you can use these works freely without permission.
- The following rules apply only to use of materials in your BPA presentation, and not for any other purpose.

**No matter what, always credit all of your sources. This is important to avoid any potential plagiarism concerns. Where the information is available, include the copyright notice, for instance: “Excerpt from \_\_\_ © 2016 XYZ Publishing Co.”**

### Disclaimer

These guidelines are intended to convey general information about copyright and trademark law. They should not be relied upon as legal advice. BPA’s services are educational in nature, and neither it nor any of its affiliates or staff are a lawyer or law firm. BPA does not represent or advise clients in any matter and are not bound by the professional responsibilities and duties of a legal practitioner. These guidelines are not an offer to represent you, nor are they intended to create an attorney-client relationship. These guidelines are intended, but are not promised or guaranteed, to be correct, complete and up-to-date. However, they may not reflect all recent legal developments and may not apply to the specific circumstances of individual situations.

### Trademark Guidelines

- A trademark may consist of a word, phrase, logo, symbol, design, sound, or combination of any of those listed (such as Google®, the Nike® Swoosh, the shape of the Coca-Cola® bottle, and sports logos). A trademark owner can register a trademark only in particular categories of goods or services for which it is using the mark.
- Trademarks are not a significant concern in the context of your BPA competition submission because infringement typically occurs when a trademark is used in connection with the sale of products or services, whereas here the use would be as a reference to describe the products or services.
- If you are concerned about the use of a trademark, you could refer to the product or service without including the logo.
- Be sure to use the registration symbol (“®”) where appropriate.

### Copyright Guidelines - Specific Types of Material

What Is Covered	What You Can Use
<b>Printed Materials</b>	
<ul style="list-style-type: none"> <li>• Poems</li> <li>• Stories</li> <li>• Essays</li> <li>• Articles</li> <li>• Picture, chart or illustration in a book</li> <li>• Books</li> </ul>	<ul style="list-style-type: none"> <li>• You may incorporate text into your project as follows <i>without</i> seeking permission of the copyright owner (but you must always <i>include a citation to your source</i>). If you use <i>more</i> content than is noted here, you will need to seek permission of the copyright holder.               <ul style="list-style-type: none"> <li>○ 10% of work or 1,000 words, whichever is less</li> <li>○ Articles, stories, or essays less than 2,500 words</li> <li>○ Poem of less than 250 words in its entirety</li> <li>○ Excerpt of 250 words from a poem of greater than 250 words</li> <li>○ One chart, picture, diagram, graph, cartoon or picture per book or per periodical issue</li> <li>○ Up to two pages from an illustrated work less than 2,500 words (such as a children’s book)</li> </ul> </li> <li>• “Consumables,” such as workbooks or standardized tests, may <i>not</i> be copied.</li> </ul>

What Is Covered	What You Can Use
<b>Illustrations and Photographs</b>	
<ul style="list-style-type: none"> <li>• Photograph (<i>e.g.</i>, from Google Images)</li> <li>• Illustration</li> <li>• Collections of photographs</li> <li>• Collections of illustrations</li> </ul>	<ul style="list-style-type: none"> <li>• Single images (such as those on Google® Images) may be used in their entirety <i>without</i> seeking permission, but you will need to seek permission to use <i>more</i> than five images by a single artist or photographer. Regardless, you must <i>always credit your source, i.e.</i>, the website from which the image was taken. This likely does not mean Google® (if you ran a Google Image search), but rather the website where the picture was posted.</li> <li>• From a collection, not more than 15 images or 10 percent (whichever is <i>less</i>) may be used <i>without</i> seeking permission (though you must <i>credit your source</i>).</li> <li>• If you are using an image you found on Pinterest® or Instagram®, try to determine who is the owner of the image and, if necessary according to the rules set forth above, seek that person’s permission to use it. Do not assume whoever posted the image is the owner. (Although Pinterest’s Terms of Service do allow you to share/use photos that are posted by others, that right is limited to use on Pinterest.)</li> <li>• If you are using an image you found on Twitter® or Facebook®, determine if the person who posted it is the owner of the image. If so, you may use it <i>without</i> seeking permission. This is because Twitter® and Facebook®’s Terms of Service, unlike Pinterest®’s and Instagram®’s, allow you to share photos that are posted by others. If the person who posted it does not own the image, however, you should determine who owns the rights to the image and seek permission if necessary under the rules described above.</li> <li>• Again, regardless of whether permission to use an image is necessary, <i>always cite your source</i>.</li> </ul>
<b>Video or “Motion” Media</b>	
<ul style="list-style-type: none"> <li>• DVDs</li> <li>• Movie or TV show clips from the Internet</li> </ul>	<ul style="list-style-type: none"> <li>• The material must be legitimately acquired (a legal copy, not illegally downloaded, bootleg or home recording).</li> <li>• You may use 10% or three minutes (whichever is <i>less</i>) of “motion media” <i>without</i> seeking permission (though, as always, <i>cite your source</i>).</li> <li>• Videos from websites ending in .gov are public domain and therefore may be used <i>without</i> seeking permission (though <i>cite your source</i>).</li> <li>• If you are creating your own video from clips of other copyrighted videos, the video must be “transformative,” i.e., a new use of the original video such as a commentary on or criticism of it, as opposed to simply a reuse of the original video. Use only as much of each copyrighted video as necessary.</li> <li>• If the video is from YouTube®, Facebook®, Periscope®, or another site where users generate content, be especially careful to determine if it was posted by the creator. If so, you can use up to 10% or three minutes of it (whichever is <i>less</i>) <i>without</i> seeking permission, but <i>be sure to cite your source</i>. If it is a re-posting by a third party, determine whether the original is available from another source. Do not include a video you have reason to believe infringes a copyright in your presentation (a “bootleg” video recording, for example).</li> </ul>

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<b>Music</b>	
<ul style="list-style-type: none"> <li>• CDs/Tapes/Records</li> <li>• Audio from the Internet</li> <li>• Electronic music files such as MP3s</li> <li>• Sheet Music</li> </ul>	<ul style="list-style-type: none"> <li>• Up to 10%, but no more than 30 seconds (whichever is <i>less</i>), of the sheet music or recording from an individual musical work may be used <i>without</i> seeking permission (but <i>always credit your source</i>). If you use an entire song, you likely need to seek permission for the use.</li> <li>• There is a separate copyright for the musical composition (i.e., sheet music of a song) and the recording of a song. In other words, even if you only include portions of sheet music or change the lyrics of a song, you should adhere to these guidelines. The copyright to the sheet music of a song may be owned by a different person than the owner of the copyright for a particular recording of a song.</li> </ul>
<b>Computer Software</b>	
<ul style="list-style-type: none"> <li>• Software (purchased or licensed)</li> </ul>	<ul style="list-style-type: none"> <li>• If you are using a framework that helps you build your software from scratch (such as Game Engine), you likely do not need to worry about copyright concerns unless the framework permits you to import portions of someone else’s software.</li> <li>• Software is copyrightable, so if your presentation uses someone else’s software, you need to be protected either by fair use or the terms of a license the copyright holder might have granted to a third party. <ul style="list-style-type: none"> <li>○ Fair use will likely apply if you use only small portions of the software and the end result is transformative.</li> <li>○ You should also check to see if the copyright owner of the software has licensed it such that third parties like you are permitted to use it.</li> <li>○ If in doubt, do not include pre-existing software in your own software competition entry.</li> </ul> </li> </ul>
<b>Data Sets (Such As Spreadsheet Entries)</b>	
<ul style="list-style-type: none"> <li>• Spreadsheet (e.g., Excel document)</li> <li>• Tables</li> </ul>	<ul style="list-style-type: none"> <li>• You may use up to 10% or 2500 fields or cell entries, whichever is <i>less</i>, without seeking permission. <i>Always credit your source</i>, however.</li> </ul>