PROFESSIONAL WRITING · STUDY GUIDE

Exam 3 Study Guide

This guide covers chapters 5 and 6, the documents that carry decisions. First the short forms: when to write a memo, a letter or a short report, and how to open, refuse, report and persuade in each. Then the long forms: scoping, report architecture, the executive summary, honest analysis and proposals that survive the first cut. Work one chapter at a time. Read the "what to know" paragraphs, copy the tables out by hand, then try each worked case with the steps covered. Finish each chapter with its ten self-test items. The cram sheet at the end puts every pattern in one place.

WHAT THIS GUIDE COVERS

- Chapter 5 · memo, letter and short report, genre versus channel, the memo header, BLUF and the action line, letter parts and block format, direct and indirect approaches and the buffer debate, four short report types, findings, conclusions and recommendations, incident narratives, problem, cost, options, ask, and routing as a record.
- Chapter 6 · writing modular, the scope statement, front matter, body and back matter, direct and indirect order, talking headings, the executive summary, the analysis chain, primary and secondary sources, claim language and limitations, solicitations, the compliance matrix, discriminators, win themes, budgets and the red team.

CHAPTER 5

Memos, Letters and Short Reports

Read it in full: **Chapter 5 in the textbook**. Practice it in the lab: **The Form Router** and **The Evidence Bench**.

What to know

Most writing that moves an organization is short: a half-page memo, a one-paragraph letter, a two-page report. These are small enough to be written carelessly and consequential enough that it shows, and they outlive the moment. An auditor or attorney may pull your Tuesday memo four years later.

A **memo** is internal. It assumes shared context and exists to make something happen inside the organization; its danger is assuming more context than a float nurse or new hire has. A **letter** is external. It becomes the institution's voice, carries letterhead and a signature, and must supply all context. A **short report** is defined by content, not audience: it answers a question with evidence gathered by a method the reader can evaluate. If you are requesting or announcing, it is a memo; if you are telling what you found, it is a report. The memo did not die; it moved into email.

Do not confuse **genre** (what the document is) with **channel** (how it travels). Choose in order: genre, then channel, then register. The channel usually decides the record: a shared drive keeps a memo for years, a chat may be purged in ninety days. The thirty-second selection test asks: inside or outside? Signature or institutional voice needed? Action or findings? Will a stranger read it in a year?

The memo header (TO, FROM, DATE, SUBJECT) does real work. TO means responsible; cc means informed. Write the date out (August 3, 2026), because 8/3/26 reads as March 8 to much of the world. Initials beside the FROM line traditionally mean the writer stands behind the final version. The subject names topic and stake. Open with BLUF in thirty words or fewer, build the body in one-idea chunks, and end with an **action line**: who does what by when and how it is confirmed, plus a default clause if silence is acceptable. Negative space (what you are not asking) prevents questions. A cc is a routing decision, not a weapon.

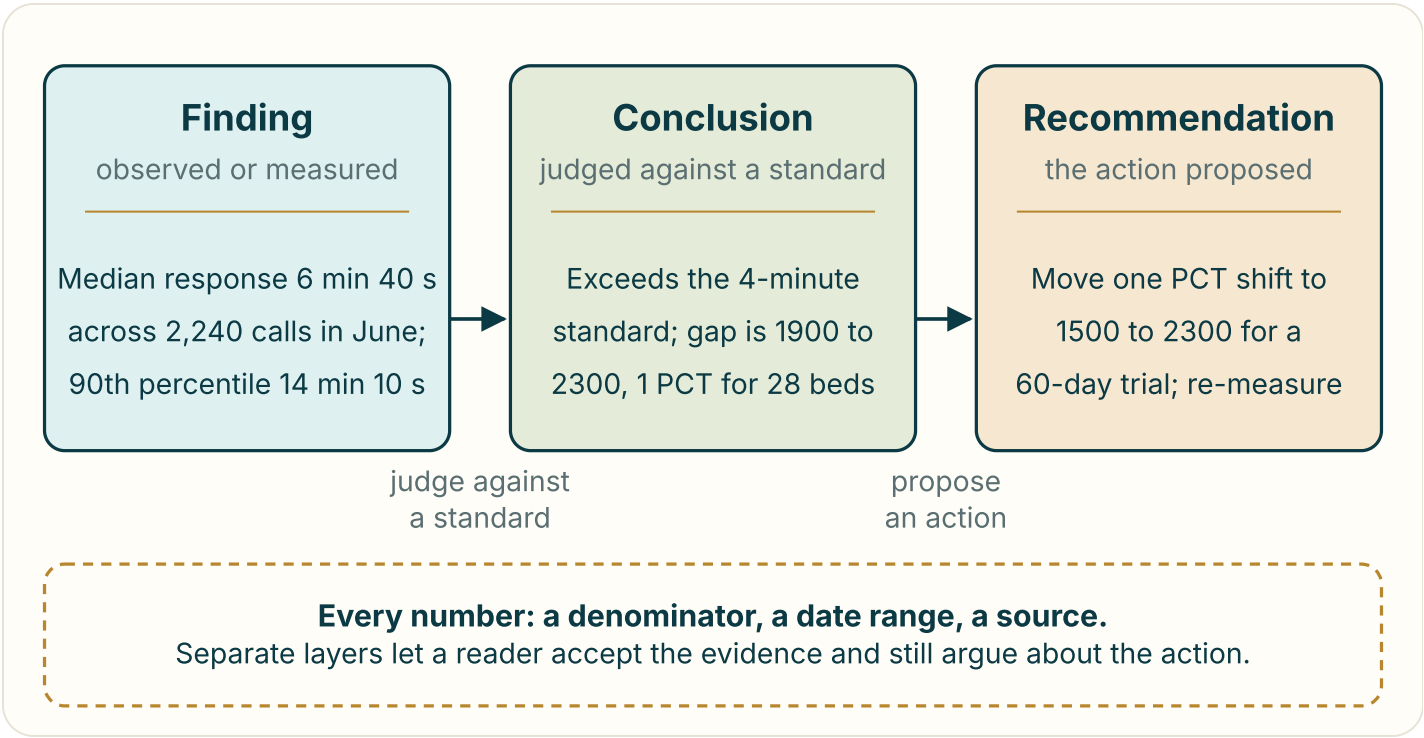
A business letter runs: letterhead, date, **inside address**, salutation, body, complimentary close, signature, typed name and title, then enclosure and copy notations. **Block format** puts everything flush left; modified block starts the date and closing at center. In U.S. business practice the salutation takes a colon; a comma is standard in British usage. Address a role when you lack a name; "To Whom It May Concern" is contested. Use the **direct approach** for routine requests, good news, claims and adjustments. The **indirect approach** with a **buffer** is traditional for refusals, but the evidence is mixed; a workable synthesis is one buffer sentence, an unmistakable refusal, the real reason, and most of the space on next steps. Use you-attitude and positive framing, delete dead phrases, and separate regret from an admission of fault. Apology statutes vary by state.

Short reports come in four kinds: informational or periodic, progress, incident, and recommendation or feasibility. A **finding** is observed or measured; a **conclusion** judges it against a standard; a **recommendation** is the action. Keep them separate so a reader can disagree precisely. Every number needs a denominator, a date range and a source, plus the pull date for dashboards. Incident narratives record observation, not inference: "found sitting on the floor", not "fell". An incident report is usually a quality-improvement document kept outside the medical record, which should not mention it; protection from discovery is real but conditional (state peer-review laws, the federal Patient Safety and Quality Improvement Act for work product reported to a listed Patient Safety Organization).

Persuasion follows four moves: problem (measurable), cost (quantified), options (including the cheapest and do-nothing), and one dated ask. Use the reader's criteria and present the do-nothing option honestly. Run the ten-check rubric on a printout or preview. A **transmittal** says what is enclosed, why, what to read first and the next step. Put the version and date in the filename and footer. Records are not yours to delete. Sleep on anger, but never on safety: report a hazard now.

LOCK THESE IN

- Memo internal, letter external, report defined by findings. Genre first, channel second, register third.
- Memo header: TO responsible, cc informed; date written out; subject names topic and stake.
- BLUF in thirty words or fewer; end with an action line (who, what, by when, how confirmed).
- Letter order: letterhead, date, inside address, salutation, body, close, signature, name and title, enclosure, cc.
- U.S. salutation takes a colon; one-sentence buffer at most before a plain refusal and a real alternative.
- Finding (observed) → conclusion (judged against a standard) → recommendation (action).
- Every number: denominator, date range, source. Incident narratives record observation, not inference.
- Persuasion: problem, cost, options, ask. The ask is the move most often left out.



Three layers, one body of evidence. Keeping the finding, the conclusion and the recommendation visibly separate lets a director accept your data while still arguing about the action.

Key terms and comparisons

Feature	Memo	Letter	Short report
Primary reader	Inside the organization	Outside the organization	Either; defined by content
Typical length	One page or less	One page	Two to five pages
Opening move	The decision or the action	Who you are and why you write	Purpose, then the headline finding
Formality	Plain, efficient	Formal, institutional	Neutral, evidentiary
Signature	Initials beside FROM, if any	Handwritten or verified electronic	Named author, title, date
Leaves behind	Operational record of a change	Legally weighted statement	Evidence someone can re-check

Letter approaches

Letter type	Approach	Model first sentence (shortened)
Routine request	Direct	Please send a certificate of insurance by September 5.
Good news or approval	Direct	Your schedule change is approved effective October 1.
Claim	Direct	Invoice 44190 charged us for 24 cases; 16 arrived.
Adjustment	Direct	We have credited your account 1,840 dollars.
Refusal or bad news	Brief buffer, then direct	Thank you for the detailed application. We cannot approve...
Persuasive or sales	Indirect	Your last three shipments arrived short...
Documenting a problem	Direct, dated, factual	This letter documents four incomplete deliveries...

The four short reports

Type	Question it answers	Most common failure
Informational / periodic	What happened in this window?	Numbers with no comparison point
Progress	Are we still on track?	Burying or omitting the slipped deadline
Incident / occurrence	What exactly occurred?	Speculation and blame written as fact
Recommendation / feasibility	Which option should we choose?	Criteria stated late or not at all

Worked cases

WORKED CASE 1 · PUTTING A RATE ON A COUNT

A unit reports six falls in June across 750 patient days and two falls in May across 780 patient days. Write the finding the way the chapter requires.

STEP 1 · COMPUTE THE JUNE RATE

6 ÷ 750 × 1,000 = **8.0 falls per 1,000 patient days**.

STEP 2 · COMPUTE THE MAY RATE

2 ÷ 780 × 1,000 = 2.56, so **2.6 per 1,000**.

STEP 3 · ATTACH DATE RANGE AND SOURCE

"Six falls in June across 750 patient days, up from two in May across 780; the rate rose from 2.6 to 8.0 per 1,000 patient days; source: unit quality dashboard pulled July 6."

WHY THE PULL DATE

Dashboards backfill. Someone who queries next week may get different numbers, and the pull date explains the gap.

WORKED CASE 2 · A MEMO OPENING AND ACTION LINE

Central Supply will take over ordering glucometer strips from Monday, August 3. Charge nurses must send a par level by Friday, July 31. Write the subject, the opening and the action line.

STEP 1 · SUBJECT

"Action needed by July 31: submit glucometer strip par levels".

STEP 2 · BLUF OPENING

"Starting Monday, August 3, all glucometer test strips will be ordered through Central Supply rather than the unit stockroom. Charge nurses need to do one thing: send your unit's par level to Materials Management by Friday, July 31."

STEP 3 · ACTION LINE WITH A DEFAULT

"Charge nurses: email your par level by 1700 on Friday, July 31; I will confirm receipt the same day. If I do not hear from you, I will carry forward your current par level unchanged."

STEP 4 · NEGATIVE SPACE

"No change to how you document blood glucose in the chart. No change to the meter itself."

WORKED CASE 3 · REWRITING AN INCIDENT NARRATIVE

Draft: "Patient fell in the bathroom because the night aide did not answer the call light in time. Patient was confused and clearly should have had a sitter. Bed alarm was probably not on." Fix it.

STEP 1 · REPLACE INFERENCE WITH OBSERVATION

Nobody saw a fall. Write where the patient was found: "At 0215 this writer found the patient sitting on the floor beside the toilet."

STEP 2 · REMOVE BLAME

Cause is the investigation's job. Record that the call light was within reach and not activated per the console log.

STEP 3 · REPLACE HEDGES WITH VERIFIABLE STATES

Not "probably not on" but "The bed alarm was found in the off position."

STEP 4 · ADD ASSESSMENT AND NOTIFICATIONS

Quote the patient, give vital signs with a time, describe findings, and record who was notified and when.

WORKED CASE 4 · PROBLEM, COST, OPTIONS, ASK

Evening coverage on 4 West is one PCT for 28 beds, and median call-light response from 1900 to 2300 is 11 minutes against a 4-minute standard. Build the persuasive skeleton.

STEP 1 · PROBLEM, MEASURABLE

One PCT covers 28 beds from 1900 to 2300; median response in that window is 11 minutes against a 4-minute standard.

STEP 2 · COST

Four of the six June falls occurred in that window, and the added cost of an injurious fall is commonly estimated near 14,000 dollars. Two avoided falls (2 × 14,000 = 28,000 dollars) would exceed the 26,000 dollar cost of the most expensive option.

STEP 3 · OPTIONS

A: move one existing PCT shift to 1500 to 2300, no new FTE. B: add 0.5 FTE evening PCT, about 26,000 dollars a year. C: no change, keep monitoring.

STEP 4 · ONE DATED ASK

"I am requesting approval of Option A as a 60-day trial beginning September 1; I need a decision by August 14 to build the September schedule."

TRAPS PEOPLE FALL INTO

- **Confusing channel with genre.** An emailed PDF letter is still a letter; a corkboard memo is still a memo.
- **Announcing that a decision exists.** "A decision has now been reached" never says what the decision is.

- **Numeric dates.** 8/3/26 reads as March 8 to much of the world. Write August 3, 2026.
- **Cc as pressure.** Everyone can read the tactic. Escalate openly if escalation is warranted.
- **Atmospheric reasons.** "Circumstances beyond our control" is not a reason. Give the real one.
- **Admitting fault in a letter.** "I am sorry this happened" is regret; "we were negligent" is a legal conclusion that is not yours to reach.
- **Collapsing evidence into action.** "We need another PCT" hides the finding and the conclusion a reader could check.
- **Mentioning the incident report in the chart.** Chart the clinical facts and care; standard practice keeps the report out of the record.

Chapter 5 self-test · ten items

1. What defines a short report, according to the chapter?

A. Its audience: readers outside the organization only
B. Its length: anything that runs longer than one printed page
C. Its channel: any document delivered as a PDF file
D. Its content: findings gathered by a method the reader can check

D. Its content: findings gathered by a method the reader can check A report can go up, down or out. What makes it a report is evidence the reader did not already have.

2. In what order should a writer make the three choices?

A. Channel, then register, then genre
B. Register, then genre, then channel
C. Genre, then channel, then register
D. Channel, then genre, then register

C. Genre, then channel, then register Decide what the reader needs first, then how it travels, then how formal to sound.

3. On a memo, what does the cc line signal?

A. Those named must approve before it goes out
B. Those named are informed, not responsible
C. Those named will be held responsible for it
D. Those named wrote part of the memo's body

B. Those named are informed, not responsible Responsibility belongs to the TO line. Say so in the body if there is any chance of confusion.

4. Why does the chapter tell you to write the date as August 3, 2026?

A. 8/3/26 reads as March 8 in much of the world
B. Spelled-out dates are required by federal law
C. Numbers in a header confuse screen readers
D. Numeric dates cannot be sorted by software

A. 8/3/26 reads as March 8 in much of the world A written-out date anchors the record and cannot be misread.

5. In U.S. business practice, how is a formal salutation punctuated?

A. Dear Ms. Ortiz, (with a comma)
B. Dear Ms. Ortiz: (with a colon)
C. Dear Ms. Ortiz; (with a semicolon)
D. Dear Ms. Ortiz. (with a period)

B. Dear Ms. Ortiz: (with a colon) A colon is U.S. business practice. A comma is personal correspondence in the U.S. and standard in British usage.

6. Which letter type should open with the direct approach?

A. A refusal of a staff member's funding request
B. A sales letter to a skeptical new customer
C. A claim that your organization was overcharged
D. A letter turning down a vendor's proposal

C. A claim that your organization was overcharged Claims, routine requests, good news and adjustments go direct. Refusals take at most a brief buffer; sales letters are indirect.

7. "Response time exceeds our 4-minute standard." What is this statement?

A. A conclusion
B. A finding
C. A recommendation
D. A limitation

A. A conclusion It judges a measured value against a standard. The measured median itself would be the finding.

8. Which incident report sentence records observation rather than inference?

A. The patient fell because the night aide was too slow to respond
B. The patient was confused and clearly needed a sitter
C. The bed alarm was probably switched off by somebody
D. The patient was found sitting on the floor beside the toilet

D. The patient was found sitting on the floor beside the toilet If nobody saw the event, you know where the patient was found, not that a fall happened or why.

9. Which move of the persuasive skeleton do writers most often leave out?

A. The ask
B. The problem
C. The cost
D. The options

A. The ask Many strong memos describe a situation thoroughly and never say who must decide what by when.

10. A document involves a patient hazard and you are angry. What does the chapter advise?

A. Wait twenty-four hours before sending anything at all to anyone
B. Send one combined message with the facts and your feelings
C. Send the factual safety report now and handle tone separately
D. Ask a colleague to send it so your name stays off it

C. Send the factual safety report now and handle tone separately Sleeping on anger is good advice for tone and bad advice for safety. Delay is itself a documented act.

CHAPTER 6

Long Reports and Proposals

Read it in full: **Chapter 6 in the textbook**. Practice it in the lab: **The Scope Contract** and **Answer the Ask: Compliance Matrix Lab**.

What to know

A long report is a different instrument from a short one. It carries a decision through an organization where the person who acts will never meet you. Nobody reads it front to back: the executive reads the summary, the manager reads the recommendations, finance reads the cost appendix, legal reads the limitations, and a new director later reads the background. So each part

must work when torn out of the whole. **Write modular.** Mistakes also get expensive, which is why long documents get a planning stage.

A **scope statement** answers five questions in writing before you gather anything: the problem, what the document will decide, what is out of scope, what evidence counts, and exactly what will be delivered to whom by when. The deliverable line is a contract. The out-of-scope line does the most work per word. Build an evidence plan (source, owner, lead time) and draft a skeleton of headings and placeholder sentences early. Answer scope creep with a choice: add it and move the date, or put it in a follow-up.

The anatomy runs **front matter** (transmittal, title page, contents, list of figures and tables, executive summary; traditionally roman numerals), **body** (introduction, background, methods, findings, discussion, conclusions, recommendations; restarting at arabic 1), and **back matter** (references, lettered appendices, each referenced by name). **Direct order** puts the recommendation first; **indirect order** puts reasoning first and suits skeptical readers or contested methods. A common compromise is direct in the summary and indirect in the body; say which you are doing. Use **talking headings**, unless a template mandates titles, in which case put an informative sentence under the required heading. Cross-reference by number ("see Table 4"), use real heading styles and alt text.

An abstract helps a reader decide whether to read on (descriptive says what is covered; informative states results). An **executive summary** is for someone who will not read further and must still act correctly, so it includes findings, recommendations and cost. An introduction orients a full reader with scope, exclusions and a roadmap. Length rules for summaries conflict (ten percent, two pages, one page per twenty); write the shortest version that supports the decision and check for a published limit. Write it last and test it: what would a colleague who read only this do on Monday?

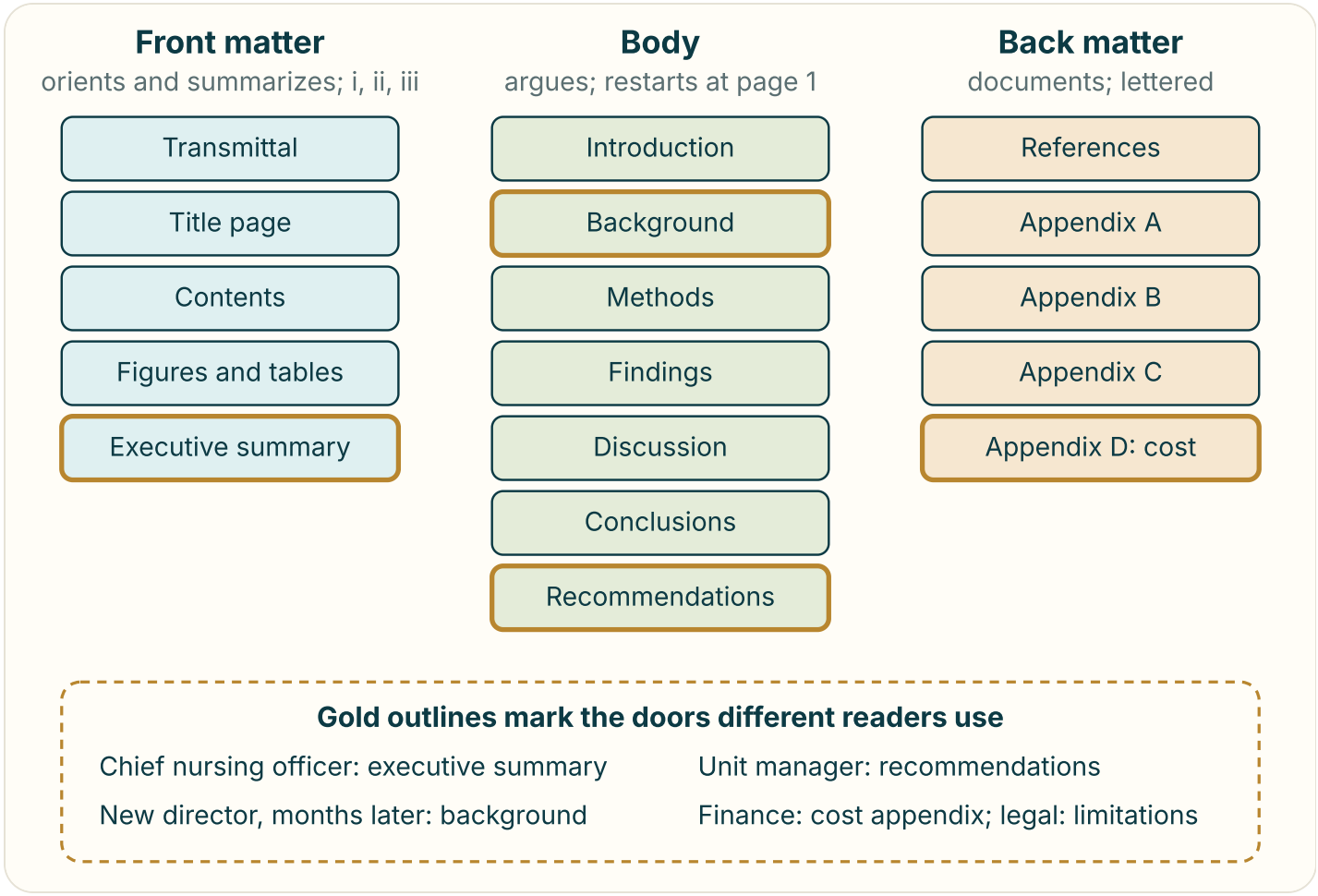
Keep the analysis chain unbroken: **finding**, **conclusion**, **recommendation**, each traceable. A recommendation with no owner, date or cost is a wish. Rank recommendations and name the ranking, state dependencies, and include the option you rejected with a reason.

Primary sources (your data, interviews, studies reporting their own results) belong in findings. **Secondary sources** (reviews, practice briefs, vendor white papers) belong in background and discussion; a national average is not a fact about your unit. Match claim language to evidence: "coincided with", not "caused". A **limitations** passage reads as competence; place it in the introduction or discussion, never scattered in footnotes. Show the arithmetic behind precise numbers. Attribute internal data with extraction dates. Treat boilerplate as a draft and search for the last client's name.

Proposals compete. Solicited proposals answer an RFI (information, no award), RFQ (price against a fixed spec), RFP (solution plus price, scored), or a NOFO for government grants (which largely replaced the FOA; NIH also issues RFAs). Unsolicited proposals must first prove the problem. The first cut is administrative, so build a **compliance matrix** on day one; in the federal uniform contract format, Section C is the work, Section L the instructions, Section M the scoring. Answer in the scorer's order, words and proportions. The persuasive core is problem, plan, qualifications, budget, schedule. Replace slogans with **discriminators**, repeat two or three **win themes**, make the budget match the narrative, run a **red team** against Section M, control versions, and submit a complete version 48 hours early.

LOCK THESE IN

- Long reports are used in pieces, so every part must stand alone: write modular.
- Scope statement: problem, purpose, out of scope, evidence, deliverable. The out-of-scope line saves the most rework.
- Front matter in roman numerals, body from arabic 1, appendices lettered and referenced by name.
- Direct order for busy or receptive readers; indirect for skeptics; often direct summary, indirect body.
- Executive summary stands alone: findings, recommendations, cost. Written last, read first.
- A recommendation needs an owner, a date and a cost; otherwise it is a wish.
- Match verbs to evidence (coincided, not caused) and name limitations before a reviewer does.
- Proposals: compliance matrix first (C work, L instructions, M scoring); discriminators beat slogans.



A report readers enter by different doors. Front matter orients, the body argues, back matter documents. Each highlighted part may be the only one a given reader opens.

Key terms and comparisons

Term	What it means	Note
Scope statement	Written agreement on problem, purpose, exclusions, evidence, deliverable	Often half a page, often in an email
Talking heading	States the content of a section	Unless a template mandates titles
Abstract	Compressed account for deciding whether to read	Descriptive or informative
Executive summary	Standalone: findings, recommendations, cost	For a reader who will not read further
Limitations	What the evidence cannot support, and why	Introduction or discussion; not footnotes
Discriminator	Checkable claim true of you, not competitors	The opposite of "committed to excellence"
Win theme	2 or 3 evidence-backed claims repeated	Drawn from the solicitation's priorities
Compliance matrix	One row per solicitation requirement	Outline, assignment sheet and checklist
Red team review	Hostile internal scoring against the criteria	Ask where you lose points
Boilerplate	Reusable standard text	Search for the last client's name

Solicitation vocabulary

Term	What it asks for	Awards?
RFI	Market information	Nothing
RFQ	A price against a spec the buyer wrote	Yes, on price
RFP	A proposed solution and price, scored	Yes, on stated criteria
NOFO	Government notice of funding opportunity	Grants; largely replaced the FOA
RFA	Request for applications (NIH still issues these)	Grants
Section C / L / M	Work and specs / instructions / evaluation factors	Federal uniform contract format

Claim language matched to evidence

What you have	Language that fits	Overreach
A complete internal count	Fourteen falls were recorded	Falls have exploded
Two variables moving together	The increase coincided with the vacancy	The vacancy caused it
Eight interviews on one unit	All eight staff interviewed described…	Staff report…
One trial in another setting	One trial in long-term care found…	Research shows this works
An estimate built on assumptions	Estimated at $129,136, assuming…	This costs us $129,000
No recorded events	None documented; reporting is voluntary	There were no near misses

Worked cases

WORKED CASE 1 · SCOPING A VAGUE CHARGE

A director writes: "Falls are up on 4 East. Look into it and write it up." Turn this into a scope statement.

STEP 1 · PROBLEM WITH NUMBERS

The fall rate rose from 2.9 to 4.6 per 1,000 patient-days between January and June; four of 14 falls caused injury.

STEP 2 · PURPOSE AND QUESTIONS

Identify contributing causes and recommend interventions doable this fiscal year. Three questions: shared conditions, screening completion, staffing and timing.

STEP 3 · OUT OF SCOPE

No comparison with other units, no review of individual staff performance, no capital purchases above $25,000.

STEP 4 · EVIDENCE AND DELIVERABLE

Six months of incident reports, screening data, the staffing grid and eight interviews. A 20-page report with a 2-page summary and cost appendix to the Quality Committee by 14 March.

CHECK

Send it back and get a "yes, that's it." The vague request is now a documented agreement.

WORKED CASE 2 · CHECKING THE COST ARITHMETIC

The summary says injurious falls cost an estimated $129,136 a year: eight injurious falls a year at $16,142 each, annualized from four in six months. Verify it.

STEP 1 · ANNUALIZE

Four injurious falls in six months × 2 = 8 a year.

STEP 2 · MULTIPLY

8 × $16,142 = **$129,136**. The figure checks.

STEP 3 · COMPARE TO THE COST

Recommendations cost $84,000. $129,136 − $84,000 = $45,136 a year more than the plan costs, under the stated assumptions.

STEP 4 · WRITE IT HONESTLY

"Estimated at $129,136 a year, assuming eight injurious falls at $16,142 each (see Appendix D)." The claim names its assumptions instead of saying "this is costing us."

WORKED CASE 3 · ONE ROW OF THE ANALYSIS CHAIN

Risk screens were repeated after a change in condition in 31% of 84 eligible cases. Build the conclusion and an executable recommendation.

STEP 1 · RESTATE THE FINDING WITH ITS COUNT

31% of 84 is about 26 cases (0.31 × 84 = 26.0), so roughly 58 of 84 eligible cases had no rescreen.

STEP 2 · CONCLUSION

Rescreening is not reliably triggered by clinical change, so risk status in the record is often stale.

STEP 3 · RECOMMENDATION WITH OWNER, DATE, COST

Add a required rescreen to the shift handoff checklist; unit educator owns rollout by 1 May; no added cost; charge nurse audits monthly.

CONTRAST

"Staff should be more vigilant" names no owner, date or cost and cannot be audited.

WORKED CASE 4 · FITTING A PROPOSAL TO THE SCORING

An RFP limits the technical volume to 20 pages and scores technical 50, past performance 30, price 20. The draft is 23 pages and buries past performance in the introduction. What do you do?

STEP 1 · TREAT THE PAGE LIMIT AS A REQUIREMENT

23 − 20 = 3 pages to cut now, tracked in the compliance matrix, not at 11 p.m.

STEP 2 · GIVE PAST PERFORMANCE ITS OWN SECTION

It is worth 30 of 100 points, so it gets a prominent section headed in the RFP's own words.

STEP 3 · SIZE SECTIONS ROUGHLY TO THE POINTS

As a starting split, 50 : 30 : 20 of 20 pages is 10, 6 and 4 pages; adjust where the solicitation asks for specific content.

STEP 4 · RED TEAM AGAINST SECTION M

Ask reviewers to score it and say where you lose points, not what they think.

TRAPS PEOPLE FALL INTO

- **Writing a long report to be read in order.** Nobody reads it front to back. Every module must stand alone.
- **No out-of-scope line.** The reader will look for something you were never asked to produce.
- **A summary that only announces findings exist.** "A number of themes emerged" tells the reader nothing. State them.
- **Recommendations as wishes.** No owner, date or cost means it cannot be scheduled, funded or audited.

- **A national average as a fact about your unit.** Secondary sources set context; local primary data carries findings.
- **Overreaching verbs.** "Caused" when the data are observational invites the whole section to be discounted.
- **Burying limitations.** Reviewers find them anyway. Name them first and frame the implication.
- **Slogans as qualifications.** "Committed to excellence" is true of everyone and worth zero points.

Chapter 6 self-test · ten items

1. Why does the chapter say a long report must be written modular?

A. Modules make the document look longer and more thorough
B. Readers read every page in order, so each section must repeat
C. Template software requires each section to be separate
D. Different readers open different sections, often in isolation

D. Different readers open different sections, often in isolation Sections are forwarded and read on their own, so each must make sense separated from the whole.

2. Which line of a scope statement prevents the most rework?

A. The title of the report
B. The out-of-scope line
C. The list of interviewees
D. The cover page design

B. The out-of-scope line Most rework comes from a reader looking for something you were never asked to produce.

3. How is front matter traditionally paginated?

A. Arabic numerals continuing straight into the body
B. Letters A, B and C, the same as the appendices
C. Lowercase roman numerals, so the body can start at 1
D. No page numbers at all until the introduction

C. Lowercase roman numerals, so the body can start at 1 Roman numerals keep a late-arriving summary from renumbering the whole document.

4. When is indirect order the better choice for a report?

A. When the audience is skeptical or the method is contested
B. When the reader is busy and already receptive to the idea
C. When the report is short and the news is routine
D. When the template requires a talking heading

A. When the audience is skeptical or the method is contested Leading with an unwelcome conclusion invites rejection before the reasoning is seen.

5. What does an executive summary include that an introduction usually does not?

A. Scope, exclusions and a roadmap
B. The full methods and instruments
C. A thank-you to the unit staff members
D. Findings, recommendations and cost

D. Findings, recommendations and cost The summary serves a reader who will not read further. The introduction orients a reader about to read everything.

6. Which recommendation can actually be executed?

A. Staff should be far more vigilant about fall risk going forward
B. Add a rescreen to the handoff checklist; educator owns it by 1 May
C. Leadership should consider ways to improve the safety culture
D. The unit ought to think about screening patients more often

B. Add a rescreen to the handoff checklist; educator owns it by 1 May An executable recommendation names an owner, a date and a cost and can be audited.

7. A fall increase happened at the same time as a staffing vacancy. Which wording fits observational data?

A. The increase coincided with the evening vacancy
B. The vacancy caused the increase in patient falls
C. The vacancy proves the falls were preventable
D. The data show the falls were due to staffing

A. The increase coincided with the evening vacancy Two variables moving together do not establish cause, and other things changed at the same time.

8. In a federal solicitation using the uniform contract format, where are the evaluation factors?

A. Section C
B. Section L
C. Section M
D. Section B

C. Section M Section C is the work and specifications, Section L the instructions, and Section M the scoring factors.

9. Which is a discriminator?

A. We are committed to excellence and to our clients' success
B. Eleven acute-care implementations since 2021, with references
C. Our staff are highly qualified and very dedicated professionals
D. We bring a passion for quality to every single project

B. Eleven acute-care implementations since 2021, with references A discriminator is checkable and true of you but not every competitor.

10. What usually eliminates a proposal first in a formal procurement?

A. Non-compliance, such as an exceeded page limit or a missing form
B. A weak win theme that the scorer simply did not find memorable
C. A budget that came in slightly higher than most other bidders
D. Too many talking headings in the technical volume

A. Non-compliance, such as an exceeded page limit or a missing form The first cut happens before anyone reads the idea on its merits.

ONE PAGE

Cram sheet

Everything from chapters 5 and 6 in one place. Cover the right column and see if you can rebuild each row.

Patterns to know

Pattern	The shape	Note
Memo header	TO, FROM, DATE, SUBJECT	TO responsible; cc informed
Memo opening	Decision or action in 30 words or fewer	Background in paragraph two
Action line	Who does what by when, how confirmed	Add a default clause if silence is fine
Letter order	Letterhead, date, inside address, salutation, body, close, signature, name and title, enclosure, cc	Block format: all flush left
Refusal	One buffer sentence, plain no, real reason, alternatives	Never leave the reader unsure
Analysis chain	Finding, conclusion, recommendation	Each traceable to the one before
Persuasion	Problem, cost, options, ask	Ask is most often missing
Proposal core	Problem, plan, qualifications, budget, schedule	Budget must match narrative

Numbers from the chapters

Item	Value	Note
Fall rate example (ch. 5)	6 in 750 days = 8.0; 2 in 780 = 2.6 per 1,000	Plus source and pull date
Call-light example	Median 6 min 40 s; 90th percentile 14 min 10 s	Standard 4 minutes; 2,240 calls
Fall rate example (ch. 6)	2.9 to 4.6 per 1,000 patient-days	14 falls, 4 injurious
Evening window	64% of falls 1900 to 2300	9 of 14
Rescreening	31% of 84 eligible cases	About 26 cases
Cost estimate	8 × $16,142 = $129,136	Plan costs $84,000
Proposal timing	Submit a complete version 48 hours early	Replace it if you improve it

Rules that are not formulas

Topic	The rule
Form choice	Inside or outside, signature needed, action or findings, stranger in a year.
Records	Channel decides retention; records are not yours to delete.
Incident reports	Observation not inference; kept out of the medical record; protection conditional.
Order	Direct for busy or receptive readers; indirect for skeptics; say which.
Summary test	A colleague who read only the summary knows what to do on Monday.
Sources	Primary in findings; secondary in background; vendor papers named as such.
Limitations	Name them first; they read as competence.
Compliance	Matrix on day one; the scorer's words, order and proportions.

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