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United States
Department of
Agriculture

Marketing and
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Animal and
Plant Health
Inspection
Service

Washington, DC
20250

PPQ Policy No. PPQ-DA-03-2

SUBJECT: E-Mail Policy

TO: All PPQ Employees

February 24, 2003

Purpose

E-mail is an important communication tool that is increasingly relied upon for the conduct of business. However, its overuse or misuse can lead to confusion and miscommunication and often results in employees spending more time than is necessary to sort through their e-mail or to understand what is expected of them. To be an effective and efficient means of communication, e-mail should be governed by a reasonable set of protocols. This policy establishes protocols to be used within PPQ when using the e-mail system.

Protocols

Identify Your Audience The most important thing to keep in mind when preparing an e-mail message is the audience. Before drafting your e-mail, ask yourself who **needs** the information. Limit your communication to those who **need to know**. If you need to send the e-mail to a large group, use the "blind copy" line in the Lotus Notes address. This will diminish the amount of time it takes the recipients—especially those in remote locations—to access the e-mail. It will also eliminate the problem of accidentally replying to an entire group when only the sender needs to receive a reply. Determine the appropriate recipients for copies. Remember, for example, to keep your supervisors informed of communications that affect the work unit or that reflect changes in policies, operations, or guidelines. In addition to identifying your audience, it is important that your audience know who the sender is. You are encouraged to include contact information or use a signature block in your e-mails—a feature that can be activated automatically in Lotus Notes.

Use Appropriate Group Addresses As a corollary to identifying the appropriate audience, you should be careful to use appropriate group addresses. E-mail group addresses are set up for many locations and can be found in the USDA address book in Lotus Notes. For example, there are separate group addresses for all PPQ employees, Riverdale employees, downtown employees, the regional offices, the State Plant Health Directors, and others. The "PPQ All" address and the headquarters address are perhaps the most frequently overused. For example, if car lights are on or articles have been lost or found in Riverdale, the appropriate address to use is a Riverdale group address, not "PPQ All" or the full



headquarters address. Group addresses should generally only be used for e-mails that apply to or are of general interest to all members of that group. They might be appropriate, for example, to announce new guidelines or policies; to let people know about the establishment or updating of a website; or to announce new hires who will interact throughout the organization. If you are in doubt, ask your supervisor for assistance in identifying the breadth of your audience.

Fill in the Subject Line Be sure you fill in the "subject" line of the e-mail with a short, informative phrase. This allows the recipient to prioritize e-mail and use his or her available time more efficiently. In addition, identify the urgency of the e-mail in the subject line using the following designators:

For Information Only

Action Required By (Date)

Information Request

Establishment or Update of Policy

Program Update

Urgent (to be used only if action must be taken in less than 24 hours)

Please note that we are pursuing the potential for establishing mandatory drop down menus with these designators in Lotus Notes.

Remember that e-mail is not always effective when used alone. If you are conveying critical information or are unsure whether your recipient has access to e-mail, follow up with a phone call. A phone call or other confirmation should almost always accompany an "urgent" or "action required" e-mail with a short deadline. Important policies or policy changes should usually be provided in the form of paper documents through appropriate supervisory channels in addition to any distribution by e-mail. New policies that change the work of employees should be discussed with employees by supervisors to ensure that there is a good understanding by employees of what is expected of them.

Be Clear and Concise Keep e-mails as brief as possible. Include the information the recipient needs to know and be clear about what is required of the recipient. Include only as much background as is necessary to frame your message. Use plain English and proofread your document before you send it. Remember that Lotus Notes has a spell check feature, which can be set up to activate every time the "send" button is activated. If you are uncertain about whether your message is conveying the information you want to convey, ask another party to read your draft and see whether he or she understands your message.

Format Your E-mail for Maximum Effectiveness When drafting an important e-mail message, be sure you identify the purpose up front. State the action required or let the recipient know the message is for information only. Explain the purpose of the action being taken and be clear in your expectations of what the recipient should do. Provide a deadline for action, if appropriate, and be sure to include a name and contact information in case the recipient needs additional information or assistance. Use subheaders for longer e-mails to make it easier for the recipient.

Concise standard formats are particularly important for "action" items, including those marked "urgent," and for policy announcements. Standard formats will be developed for these and other categories described above. Those formats will be made available when ready to simplify and standardize communication by e-mail. If possible, the formats will be made available electronically by incorporating them into the current system.

Limit the Use of Graphics and Animation While making your e-mail visually appealing can enhance the communication, it is best to keep the use of graphics and animation to a minimum. These devices can make it difficult for those in remote locations to open the document and can tie up an individual's e-mail system if he or she is working from a remote location or using dial-up access on a laptop.

Use Attachments Wisely If possible, include all pertinent information in the body of the e-mail. When you need to use attachments, be sure to send them in appropriate formats. PPQ employees should be able to access either Word Pro or Word. If you are uncertain about the software your recipient has on his or her computer, convert your documents to rich text format before sending. Rich text format is a format that is accessible through most word processing packages. You can convert to this format by using the "save as" feature when saving your document. Open the drop-down menu for "save as type" and select "Rich Text Format." If you must send multiple attachments and they are all lengthy, consider sending them in batches to prevent inordinate delays in accessing the e-mail.

Use of E-Mail During Emergency Situations E-mails sent during an emerging crisis will be sent from one sender, even though a group may be involved in responding to the crisis. The initial message should announce the emergency and give a specific time and date when updates can be expected. The name of an individual who can be contacted if people have questions should be specified in the e-mail.



Richard L. Dunkle
Deputy Administrator
Plant Protection and Quarantine