

4A051, Module 1, The Air Force Medical Service



Lesson 1: Continuous Process Improvement (CPI)



Lesson 2: Interpersonal Communication



Lesson 3: Official Communication and Self-Inspection

Lesson 1: Continuous Process Improvement (CPI)

***Are you ready for our journey into the Health
Services Management Journeyman Course?
Click the video below to begin our
adventure!***



After completing this lesson, the student will be able to identify the DHA Ready Reliable Care and CPI management system as it relates to health services management, in accordance with (IAW) prescribed guidance and publications.

Let's jump into DHA Ready Reliable Care.

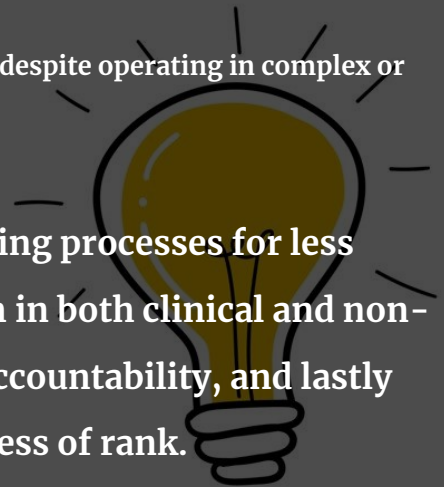
Overview

This is the Defense Health Agency's approach to increasing high reliability across the Military Health System. It builds on the existing work and best practices of the service medical departments and the DHA. Ready Reliable Care works across clinical and non-clinical settings to drive better outcomes for patients, staff, and the enterprise.



A high reliability organization (HRO) achieves top outcomes despite operating in complex or high-risk environments.

These outcomes are achieved by standardizing processes for less variability, reducing errors to achieve zero harm in both clinical and non-clinical areas, celebrating transparency and accountability, and lastly valuing everyone's input, regardless of rank.



Principles

The Ready Reliable principles apply to our work and staff in every job. Utilizing these principles advances high Ready Reliable Care Principles:

- Preoccupation with Failure
- Sensitivity to Operations

- Deference to Expertise
- Respect for People
- Commitment to Resilience
- Constancy of Purpose
- Reluctance to Simplify



Domains

Utilizing the Ready Reliable Care Domains of Change in our daily work life, creates progress system-wide. These domains are (*click each box*):

☐

Leadership Commitment

☐

Culture of Safety

☐

Continuous Process Improvement



Patient Centeredness



Complete the content above before moving on.

Knowledge Check. Select and submit the best option in response to the question below.

What is one principle of Ready Reliable Care?

- ☐ Decision-making
- ☐ Deference to expertise
- ☐ Non-maleficence
- ☐ Autonomy

SUBMIT

Knowledge Check. Select and submit the best option in response to the question below.

What is one of the Domains of Ready Reliable Care?

- ☐ Leadership
- ☐ Communication
- ☐ Patient Centeredness
- ☐ Privacy of Care

SUBMIT

Knowledge Check. Select and submit the best option in response to the question below.

What type of organization does Ready Reliable Care create?

- ☐ Functional Organization
- ☐ High Reliability Organization
- ☐ Divisional Organization
- ☐ Hybrid Organization

SUBMIT



Complete the content above before moving on.

Next, let's discuss CPI.

Continuous Process Improvement



Purpose

Continuous process improvement (CPI) is the repeated cycle of improving your workplace. It allows you to identify problems in your daily work and find the best solution. The CPI Management System is a user-friendly way to use CPI in your workplace.



Click through the CPI components below to learn more.

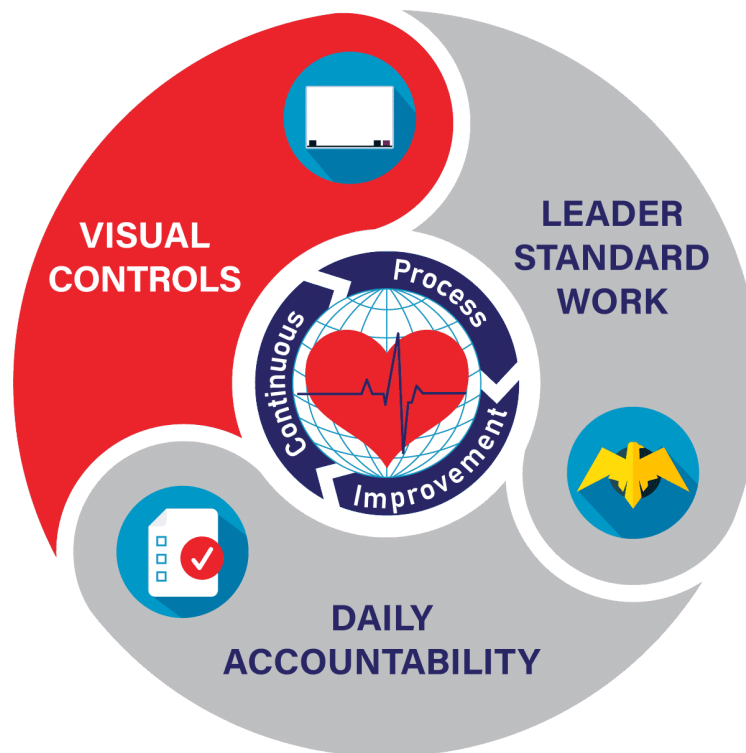
Three Principal Elements of the CPI Management System



One of the key components in the CPI Management System will be flight or team huddles. You will experience huddles immediately upon your first assignment and multiple times after.

Step 2

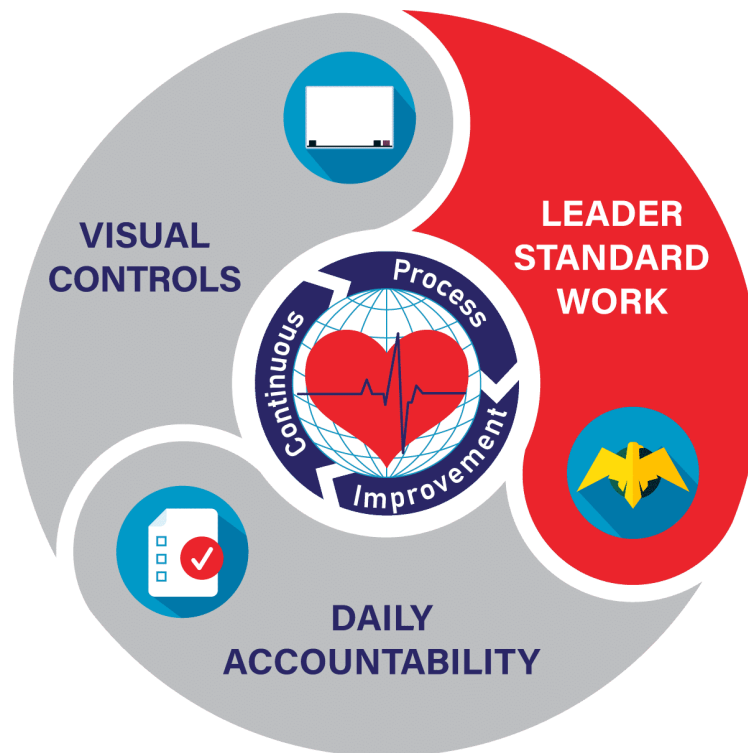
Visual Controls



Each team has a Daily Management Board which allows members to quickly organize and communicate objectives, goals, data, and standard work processes.

Step 3

Leader Standard Work



Leaders define, determine, and standardize activities such as huddling/rounding and focusing on front line issues. Ensures leader involvement in improvement work to foster a culture of innovation and improvement.

Step 4

Daily Accountability



Allows frontline staff to keep themselves and each other accountable to standard processes. Enables junior staff to speak up regarding safety concerns, and complete process improvement activities. Additionally, keeps leaders accountable to frontline staff.



Complete the content above before moving on.



Click through the CPI problem-solving methods below to learn more.

CPI Problem-Solving Methods



Everyone has encountered a problem in their life that has required a solution. The problem-solving methods that the Air Force Medical Service (AFMS) uses within the CPI Management System are the same. We're just putting names to standardized solutions.

The AFMS uses three different problem-solving methods because every problem is different; they can't all be solved with one solution.

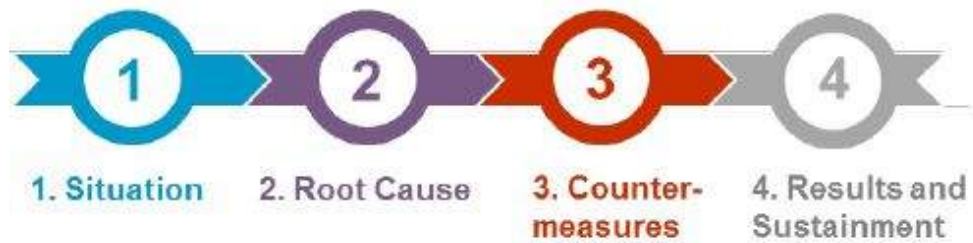
Step 2

JUST DO IT :



This is not a specific process improvement method, but it allows accountability and empowerment for the team and its members to identify and implement a solution.

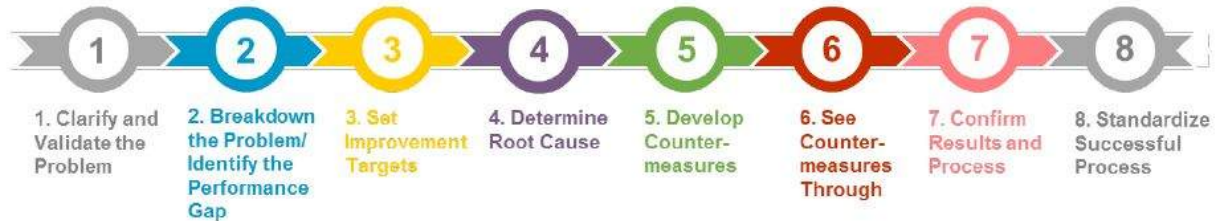
CPI DAILY MANAGEMENT :



This is designed to foster a culture of continuous improvement. It encourages teams to put daily attention on issues. Problems requiring this solution are typically less complex, require less data collection and only affect a small group.

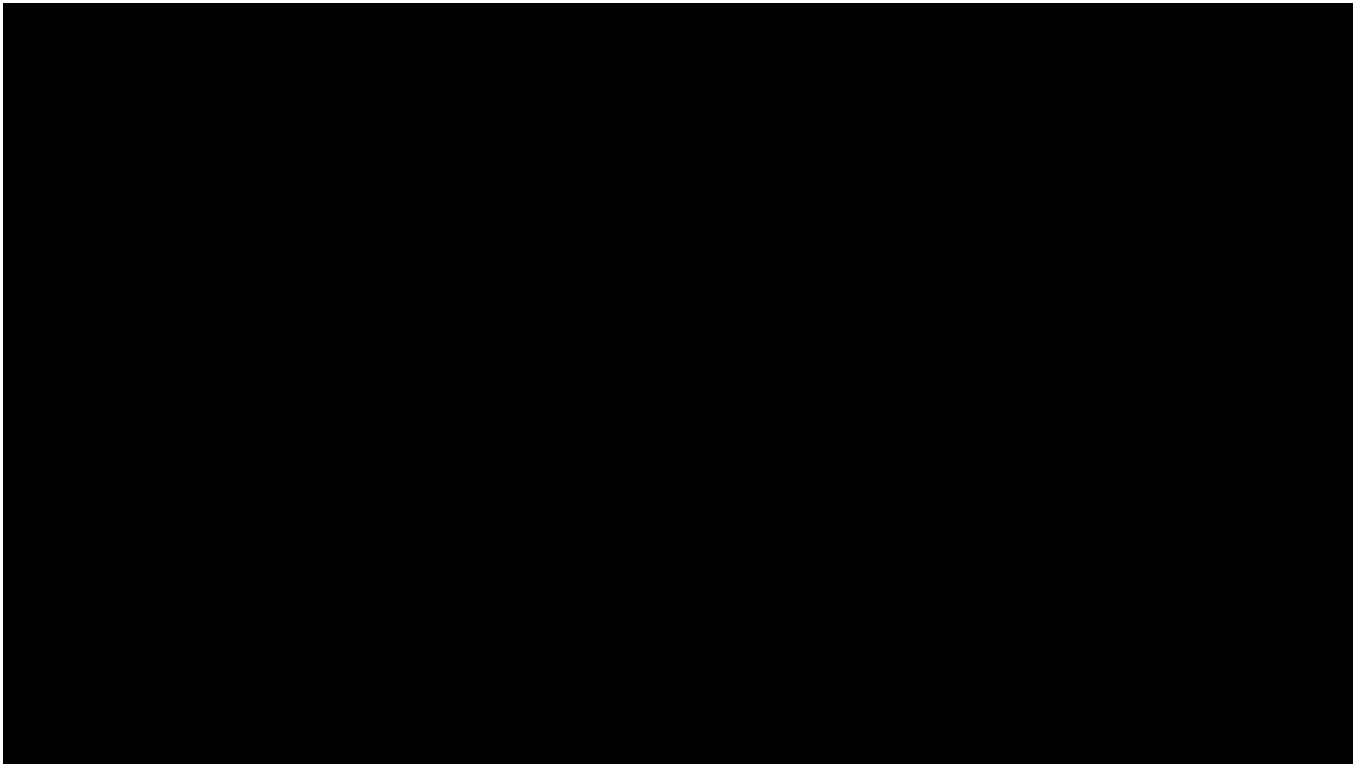
Step 4

PRACTICAL PROBLEM SOLVING METHOD (PPSM) :



This method was previously known as the 8-Step Standardized Successful Process. This solution is typically used for complex issues that affect multiple areas. An A3 is used to track progression through this system. The colors on the PPSM and CPI Daily Management piece show which steps overlap.

To wrap-up this section, click the video below explaining daily huddles and leaderboards.



Complete the content above before moving on.

Knowledge Check. Select and submit the best option in response to the statement below.

Continuous process improvement (CPI) is the repeated cycle of worsening your workplace.



True

☐

False

SUBMIT

Knowledge Check. Select and submit the best option in response to the statement below.

Daily accountability keeps leaders accountable to frontline staff.

☐

True

☐

False

SUBMIT

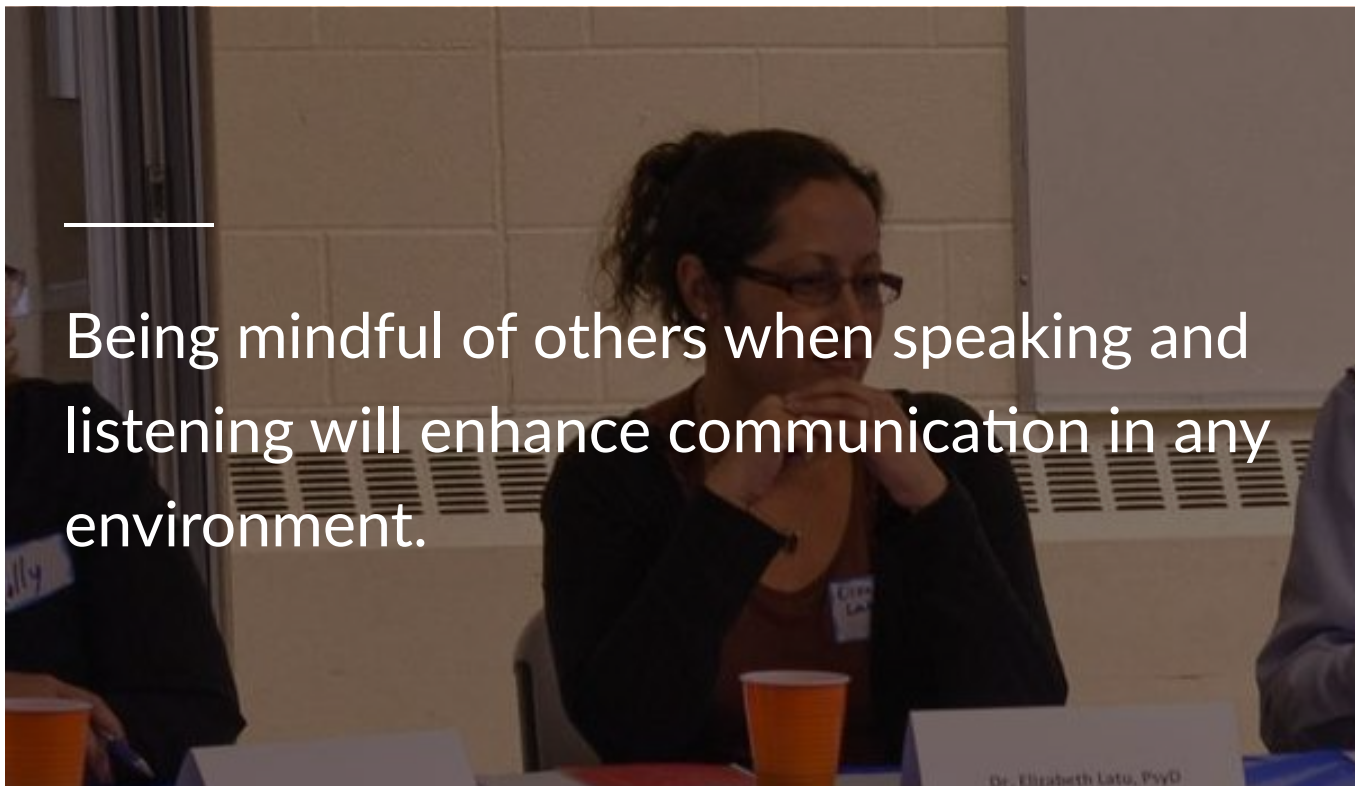


Complete the content above before moving on.

Lesson 2: Interpersonal Communication

After completing this lesson, the student will be able to identify effective interpersonal communication principles as they relate to health management services, IAW prescribed guidance and publications.

Being mindful of others when speaking and listening will enhance communication in any environment.





Communication takes 100% effort from everyone involved in the process. Sometimes we might think that talking or writing are the only ways to communicate, but there are several ways!

We'll cover some basic communication methods in the Air Force, and communication techniques you may not think about all the time.



Not Everyone Has a Single Communication Style

It's important to realize that most people don't have a single communication style. Rather, many of us naturally lean on one to two dominant styles. We might combine or change styles in different situations. Communication styles are fluid, rather than set. That means you can learn to adapt your communication based on your listener or what the situation demands.

Which Style Are You?

Expand the rows below to review four styles of communication. As you review each style, identify which one is most dominant for you.

Action-Based

People with an action-based communication style center their communications on action steps and how to produce results.

Action-based communicators are often directors, go-getters, and natural leaders. Their communication style is direct, task-oriented, and cuts to the chase. They don't hesitate to assign roles or delegate tasks to get the job done. They may appear assertive, decisive, and goal-oriented. Managers often employ an action-based communication style.

Common phrases of this communication style include:

- "I need you to ..."
- "Here's our plan."
- "The deadline is ..."
- "What's our implementation strategy?"
- "Let's talk about next steps."

Fact-Based

A fact-based communication style values details, facts, and logic.

People with this communication style take a pragmatic, systematic, or scientific approach to interpreting and sharing information. They often appear serious or cautious in their work, and they might ask a lot of questions or evaluate information critically in their quest for accuracy.

It's not uncommon for engineers, data scientists, and researchers to exhibit this communication style.

Common phrases of this communication style include:

- "What does the data say?"
- "How did you reach that conclusion?"
- "We'll conduct an A/B test to identify which works best."
- "Let's review the strengths and weaknesses of each."

Idea-Based —

This communication style likes to focus on ideas, vision, and the high-level or “big picture” items. They often prefer brainstorming, connecting, and developing ideas rather than talking about how to execute them.

Idea-based communicators are often seen as innovators, entrepreneurs, or dreamers.

Common phrases of this communication style include:

- “I’ve developed an overview/outline of ...”
- “The big picture is ...”
- “Here’s the vision.”
- “Imagine ...”

People-Based —

The last communication style is people-based or relational. This style focuses on relationships, supporting people, and understanding what others think or feel.

People-based communicators are social, personable, and people-oriented. They take a collaborative approach to their work and like to discuss ideas or talk through issues together.

People-based communicators seek harmony, connection, and strong team relationships. Community managers and customer specialists are two examples of typical careers that might require a people-based communication style.

Common phrases of this communication style:

- “How do you feel about ...”
- “I really appreciate your ...”
- “I’d love to get your thoughts on ...”
- “From a customer’s perspective ...”

Now, ask yourself..."Do I have a primary communication style?" and "Can I be flexible in my style?"

CONTINUE

Customer Service

As a 4A0, you will interact with external customers (patients) and internal customers (Medical Group staff). It's important that the quality of customer service and communication are for both types of customers, professional and expedient.

Often when you think of communication you may think of how you transmit information. However, before you can consider that, how do you listen? Active listening makes you the best person to receive and then transmit information in any relationship!



The video below focuses on communicating during patient treatment, but the skills highlighted may also be applied in your role as a 4A0 when interacting with patients.

WWW.PERCIPIO.COM/



37. MEDIC-X: Communicating with Patients (Bedside Manner)

This Communication with Patients (Bedside Manner) training video focuses on developing effective communication skills for healthcare providers. Learn how to establish rapport, demonstrate empathy, and engage in active listening to create a positive patient experience. The training also covers recognizing and responding to patient emotions, including anger and suicidal ideation, and escalating concerns to the clinical team.

READ MORE WWW.PERCIPIO.COM/ >

Here is a transcript of the video above.

Communication with patients, Bedside Manner.

Introduce yourself to the patient and smile.

Create a climate of warmth and acceptance, providing comfort and support to the patient.

Use appropriate nonverbal behaviors. For example, making good eye contact, smiling, maintaining an open relaxed position, and sitting at eye level with the patient.

Never speak to the patient with your back turned.

Always face the patient when communicating.

Verify the correct patient using at least two identifiers and explain what you plan to do in the interaction with the patient. For example, "I am here to check your vital signs."

Observe the patient for behaviors that indicate the patient is angry. For example, pacing, clenched fists, loud voice, throwing objects, and expressions that indicate anger. For example, repeated questioning, not following requests, aggressive outbursts, swearing, and threats.

Prepare for communication by considering patient goals, time allocation, and resources.

Recognize your personal level of anxiety and consciously try to remain calm. Breathe slowly and deeply. Be aware of nonverbal cues that indicate anxiety.

Explain applicable treatment or interventions to the patient and ensure they agree to the treatment.

Always use simple terms and avoid acronyms and medical jargon.

Use appropriate nonverbal behaviors and active listening skills, such as staying with the patient and having a relaxed posture.

Assess the patient for an increased risk of suicide. Notify clinical team of any signs of depression or increased suicidal/homicidal risks or verbalizations by the patient.

Be honest and listen from the patient's point of view.

Use open-ended questions, such as, "Tell me about how you're feeling," or, "You seem sad. Tell me about your sadness."

Provide necessary comfort measures.

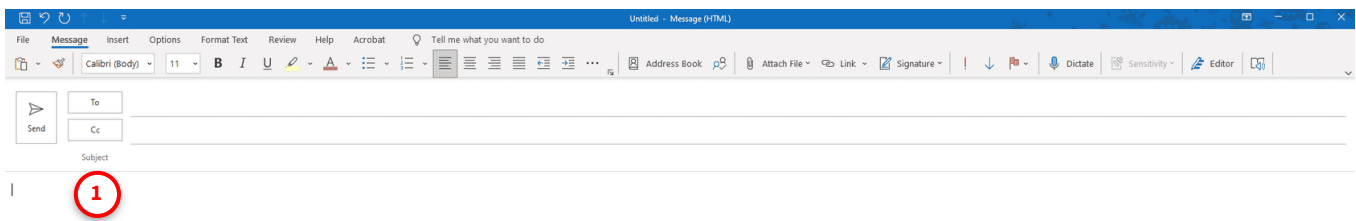
Document any procedures performed and patient receptiveness to communication in the patient's record.

CONTINUE

E-mail Etiquette

You will be very familiar with communicating through electronic messages. You have most likely been communicating this way for many years, but do you understand how to communicate in an “official” capacity? E-mailing people in and outside of your organization requires a more formal vocabulary than what you might use with your friends or family. To uphold a commitment to secure messaging, the Air Force has established guidelines to be used by all Air Force members.

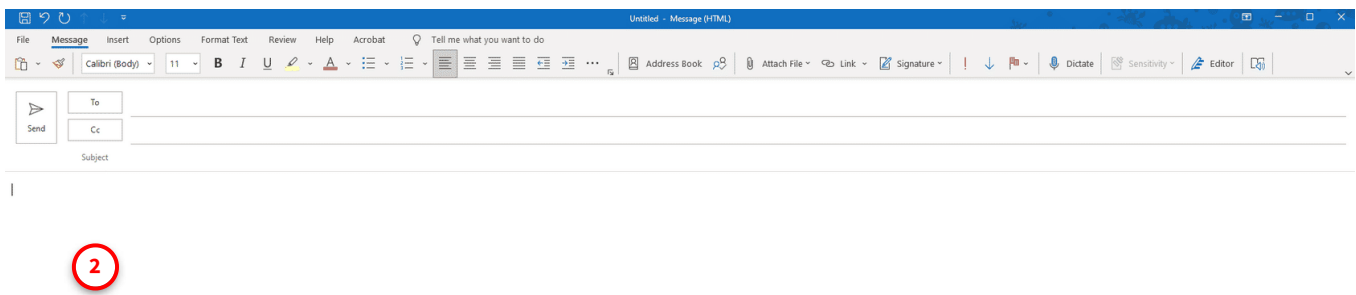
Select each hot spot below for e-mail rules according to the Air Force Handbook (AFH) 33-337, *Tongue and Quill*.



Rule #1

Be clear and concise. Make sure the subject line communicates your purpose. Be specific and avoid ambiguous titles. Lead with the most important information. If the goal is to answer a question, then reiterate the question at the top of the page.

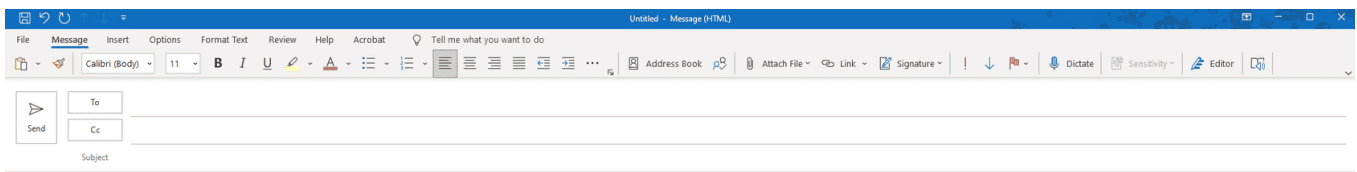
Use topic sentences if the e-mail has multiple paragraphs. Be brief and to the point. Use bold, italic, or color when necessary to emphasize key points. Choose readable fonts, 12 point or larger when possible.



Rule #2

Watch your tone. Be polite. Think of the message as a personal conversation. Be careful with humor, irony, and sarcasm. Electronic postings are perceived much more harshly than they are intended, mainly because the receiver cannot see the sender's body language, hear the tone of voice, or observe any other nonverbal cues that could help interpret the intent of the communication.

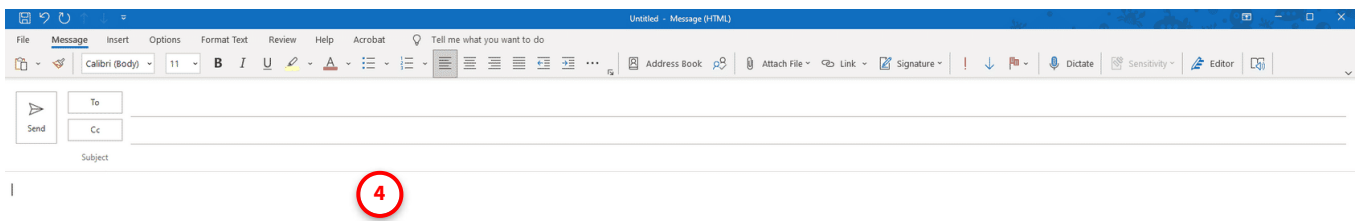
Do not write using all CAPITAL letters—this is the e-mail equivalent of shouting and is considered rude. Keep the e-mail clean and professional. E-mail is easily forwarded. Harassing, intimidating, abusive, or offensive material is unacceptable.



3

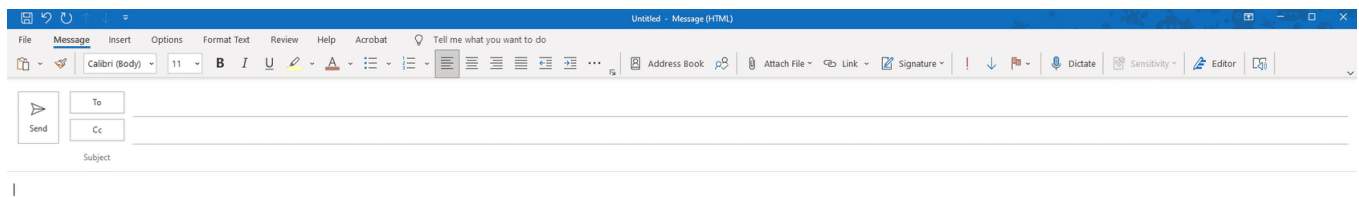
Rule #3

Be selective about what message you send. Do not discuss controversial, sensitive, or classified information. If your e-mail includes HIPAA, Privacy Act or Controlled Unclassified Information (CUI) ensure you use encryption. Do not create or forward junk mail, do not create or send chain letters, and do not use e-mail for personal advertisements.



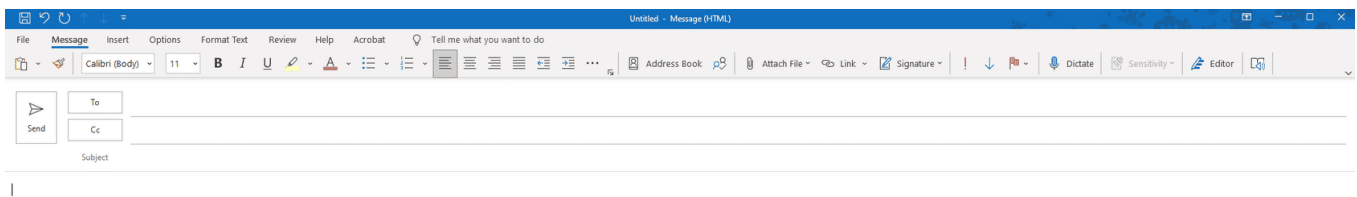
Rule #4

Be selective about who gets your message. In other words, only use “reply all” sparingly. Get permission before using large mail groups. Double-check the address before mailing, especially when selecting from a global list where many people have similar last names.



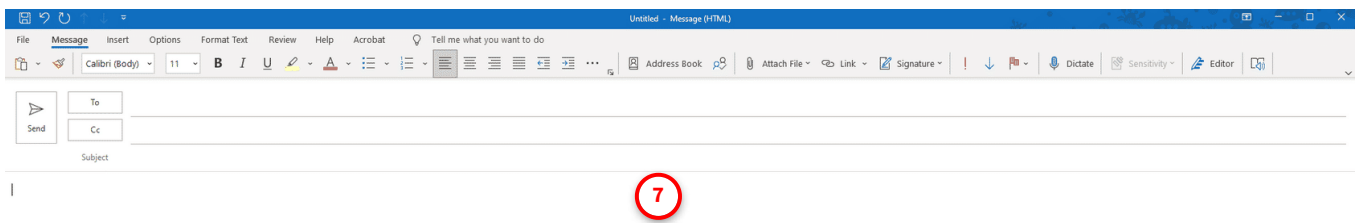
Rule #5

Check your attachments and support material. Ensure all information is provided as intended in your message to keep from having to send a follow-up e-mail. Before sending, ensure you have attached necessary documents; this is a very common mistake.



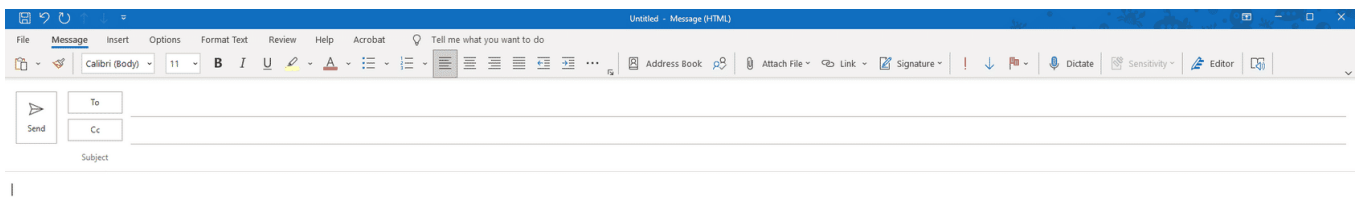
Rule #6

Keep your e-mail under control. If possible, create mailing lists to save time. Read and delete e-mails daily. Acknowledge important or sensitive messages with a courtesy reply to sender. When away from your e-mail for an extended period, create an “Out of Office” message.



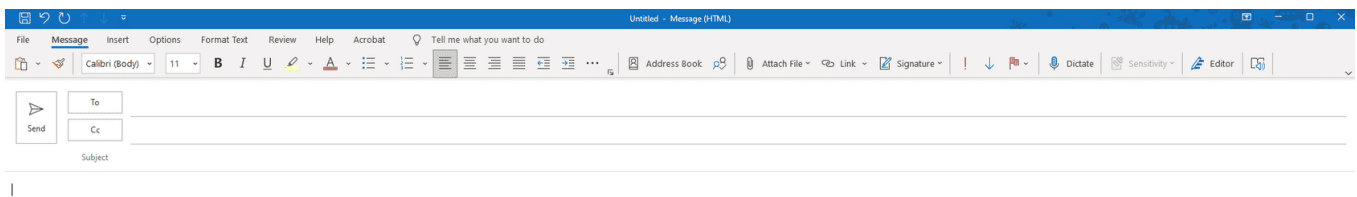
Rule #7

Use proper format for official e-mail. The subject line should follow the appropriate format (given by organization or major command (MAJCOM)). Use keywords to assist the recipient with how to prioritize the e-mail. The subject should be no more than five to seven words. Make sure the body of the e-mail is descriptive and clear on expectations.



Rule #8

Use organizational e-mail accounts. Organizational mailboxes (OMs) are shared e-mail accounts specific to an organization. E-mails sent on behalf of an office or organization are official correspondence and should be filed and maintained in an approved file structure.



Rule #9

Official e-mail must contain a complete signature element clearly indicating who sent the communication, the term “signed”, and the authority line, if appropriate. Indicate the signature by the word “signed”.

For example:

//signed//

JD Roberts, SrA, USAF

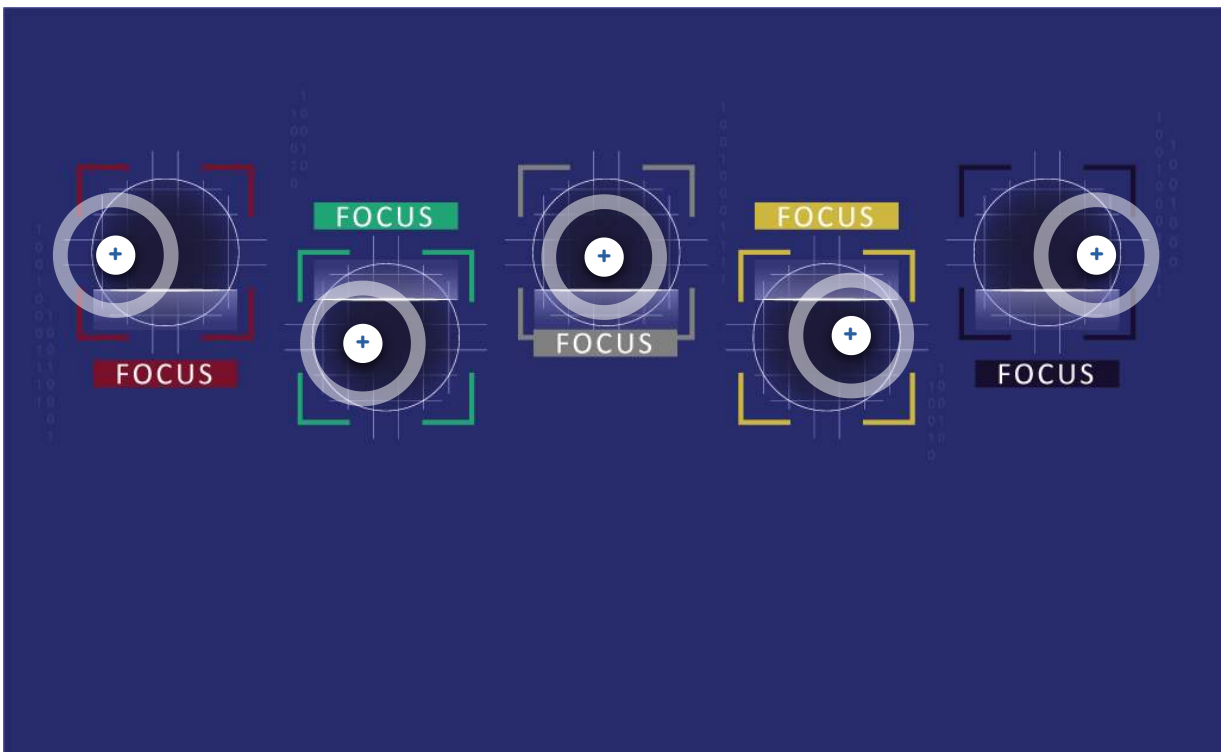
Outpatient Records Technician

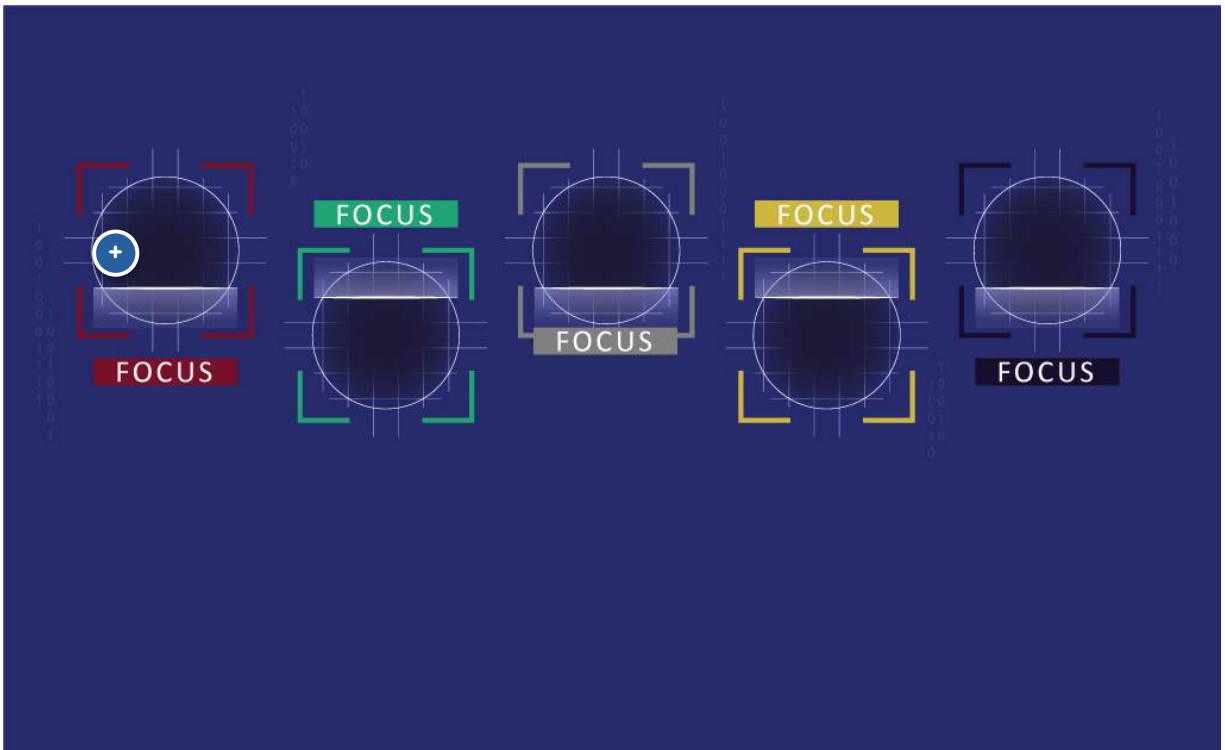
CONTINUE

For official e-mail, a good reminder for constructing your e-mail is FOCUS, which stands for Focused, Organized, Clear, Understanding, and Support.



Click each hot spot below to learn more about the F-O-C-U-S terms.

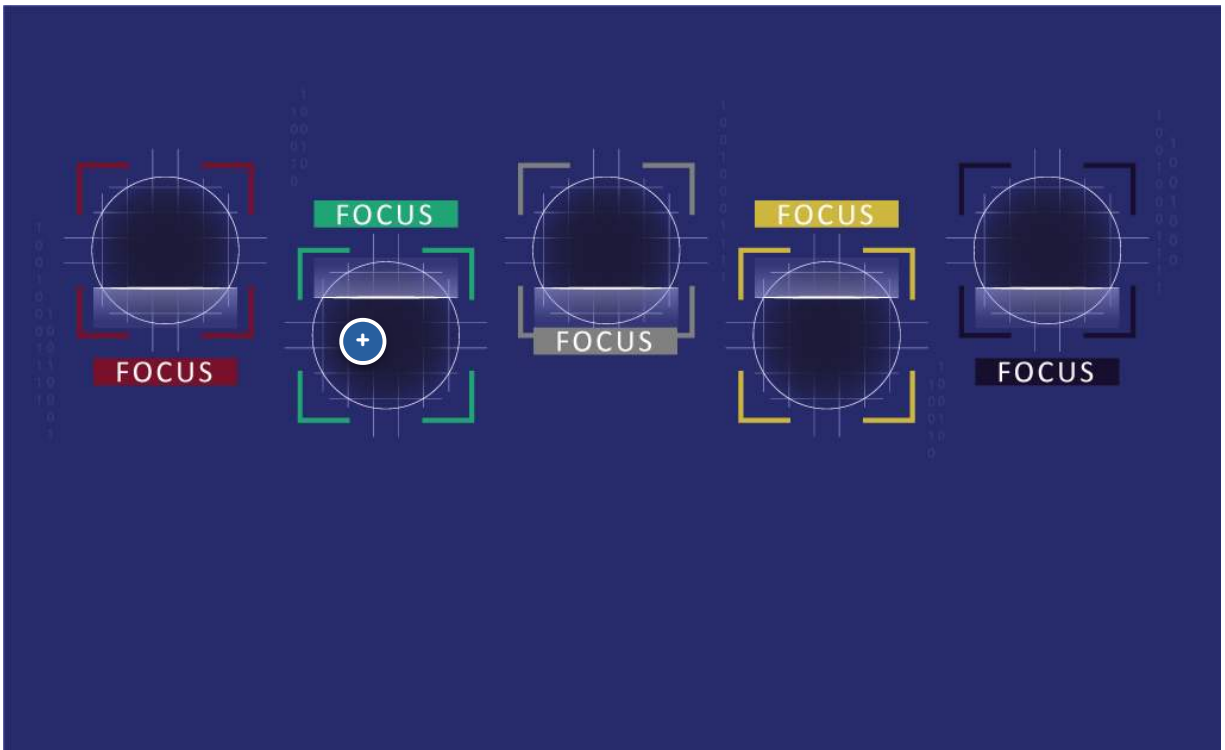




F - Focused

Attention should be on the issue and what needs to be done.

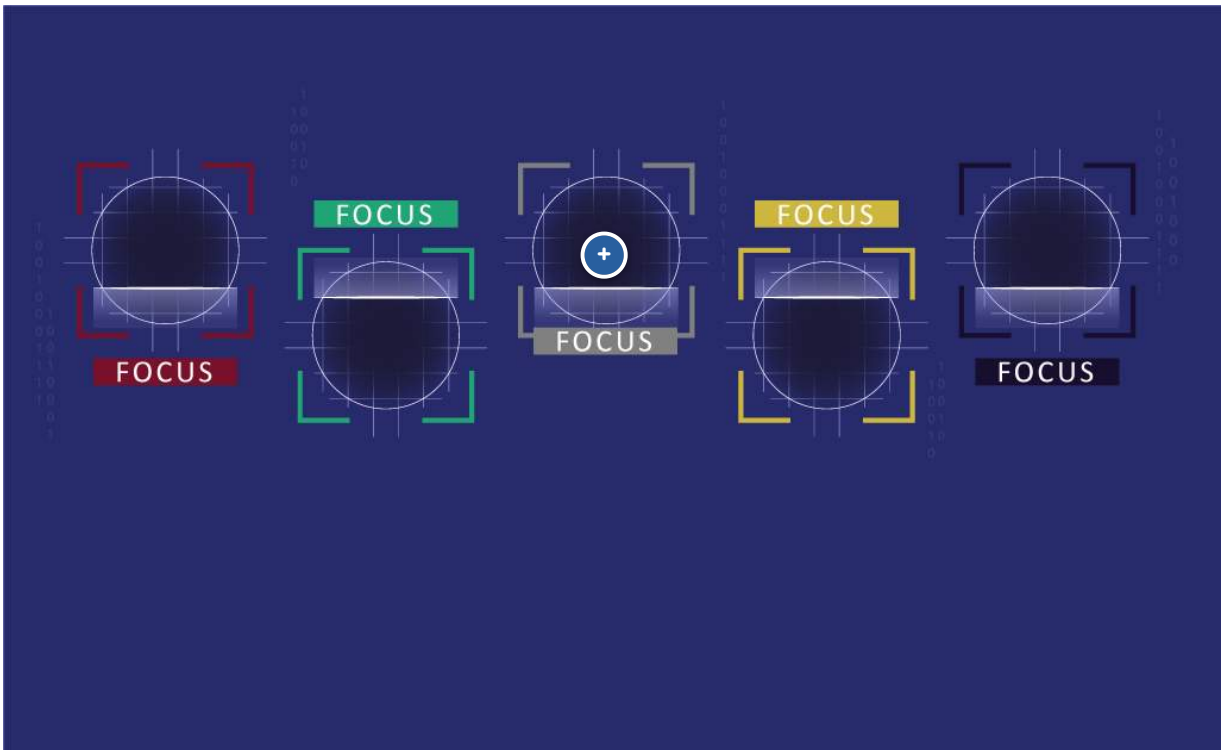
- Don't discuss controversial, classified, or unnecessary personal information.
- Always use good computer security (COMPUSEC) and operations security (OPSEC).
- Consider if calling may be a better option.



O - Organized

Easy to understand flow of thought can be helped by using specific organization methods.

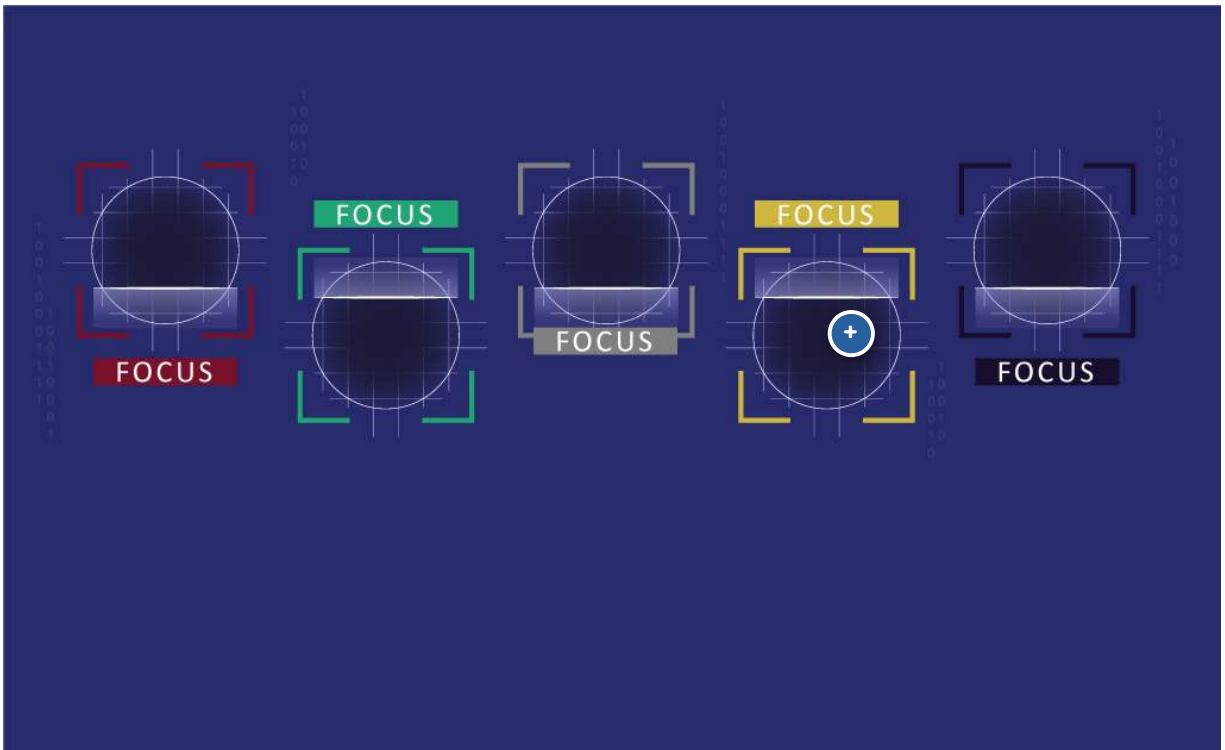
- In addition to e-mails, keep your e-mail “boxes” organized. Read and separate e-mails into specific folders and delete unnecessary e-mails.
- Consider using BLUF (Bottom Line Up Front) with a short summary as your first sentence if there is a lot of information.
- If you need to send a very in-depth e-mail, use a BLIND statement (BL = Bottom line; I = Impact on the organization; N = Next steps to be taken; D = details to support the bottom line or Discussion points).
- Use a signature block with //SIGNED// above your basic information so others may contact you as necessary. Your signature block may include name, rank, service affiliation, duty title, organization name, phone numbers (defense service network [DSN] and/or commercial).



C - Clear

Use basic language.

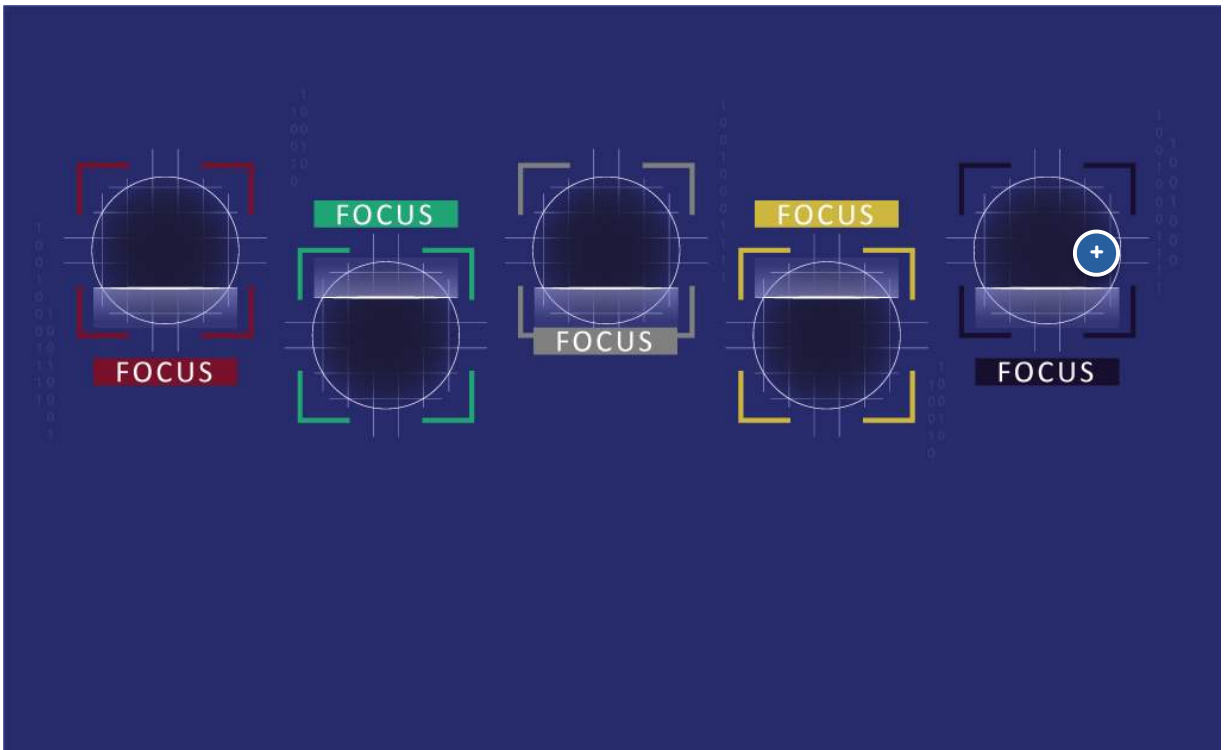
- Filter information and only keep what is necessary. Consider what the reader “needs to know” for the situation at hand.
- Use proper format for the subject line. You may include keywords to bring the reader’s attention to necessary items such as ACTION, SIGN, COORD, INFO, URGENT. These items and other acronyms are the only time that writing in all caps is allowed.
- Use a proper greeting depending on time of day (Good Morning/Afternoon), and/or addressee’s rank.



U - Understandable

Can be comprehended by all audience members.

- Pay attention who you're sending the e-mail to and use "Reply All" sparingly.
- Use colors, highlighting, and italics as needed. Always use an easy-to-read font.
- Consider your tone when writing; often sarcasm, humor, and irony do not come across in written formats.
- Do not use emojis or emoticons.



S - Supported

Necessary information such as attachments are included.

- If attachments are necessary, check that they are in place prior to sending.
- Name attachments in an easy-to-understand manner. Consider using Tab #1, Naming Convention; Tab #2 Naming Convention.



Complete the content above before moving on.

Telephone Etiquette

When it comes to telephone etiquette, there are two areas that you have to be concerned about and those are: be prepared to answer the phone and calling customers. Below you will read some helpful tips to ensure you are not wasting anyone's time and you are relaying a clear and accurate message.

First, let's begin with answering the phone.

Answering the Phone

Answer

When you hear the telephone ring, you should answer it as soon as possible. If you are helping a customer at the time your phone rings, understand that the person on the other end is also a customer. Be polite to your current customer while excusing yourself to answer the call, and ask the caller if they would mind being placed on a short hold.

Answering the Phone

Identify Yourself

Collect yourself, greet your customer, and speak slowly. You should always use standard greetings such as “Good Morning, this is A1C Smith, in outpatient records, how may I help you?” This prevents confusion and reassures patients that they have called the correct place. Because we come from different backgrounds, the rate at which we speak differs tremendously from person to person. However, when on the phone, we all must train ourselves to speak slowly enough so others understand us. This gives customers the impression that we are not rushed and we are willing to spend time and hear what they have to say. It also prevents you from repeating yourself.

Answering the Phone

Avoid Abrupt Phrases

You should not cut off the person on the other end of the line with abrupt phrases. Never interrupt or use such phrases as, “He isn’t in,” “He’s busy,” or “What do you want?” These phrases give customers the impression that you are not interested in helping them. Instead, let them finish what they need to say. The same way we use a more formal vocabulary in official e-mail, you may be required to speak formally on the phone as well.

Answering the Phone

Take Messages

If you receive a phone call and the person for whom the call is intended is not in the office or tied up at the time, ask if you can assist or if you can take a message. Sometimes the customer has a general question that anyone can answer, other times it may be necessary to take a message. It is important to make sure you get the necessary information and that you deliver it promptly. You should ask for the person’s name, contact number, reason for the call, date, and time of the call.



Next, let's discuss calling customers.

Calling Customers

Plan Your Conversation

This is the first thing you do when calling someone. You do not need to have a script written for every phone call you make, but you should have some idea of what you are going to say. Some things to consider before you make a call are who you're calling, why you're calling, and the goal of the conversation.

For example, if you were calling Captain Moore to schedule him for a follow up appointment, some information you need to know would include the date, the time of the appointment, the

location, and any documents they are required to bring to the appointment.

Calling Customers

Identify Yourself

Just like when you answer the phone, identify yourself. When a person picks up the other end of the line, be prepared to identify yourself. At a minimum, give your rank, name, and the organization to which you are assigned.

Calling Customers

Speak Clearly

Hold the receiver about an inch from your mouth, speak slowly, speak up, but do not yell, and do not run your words together. Be brief, business-like, and remain professional.

Calling Customers

Mind the Time

If you know your call will be lengthy, make sure you ask if the other person has time to talk. If they state they are too busy to talk right now, ask them when is a good time to call back. Make sure that you call back at the specified time. If possible, limit your call to five minutes.

Calling Customers

Terminating Your Call

At the end of your conversation, acknowledge you have received the desired information, thank the individual for their assistance, and give your closing salutation or goodbye.

CONTINUE

Verbal/Nonverbal Cues

Smiling, making eye contact, relaxed arms and hands (create trust while communicating), pleasant listening level, keeping a normal pace, and a pleasant tone are all important to keep in mind while communicating.

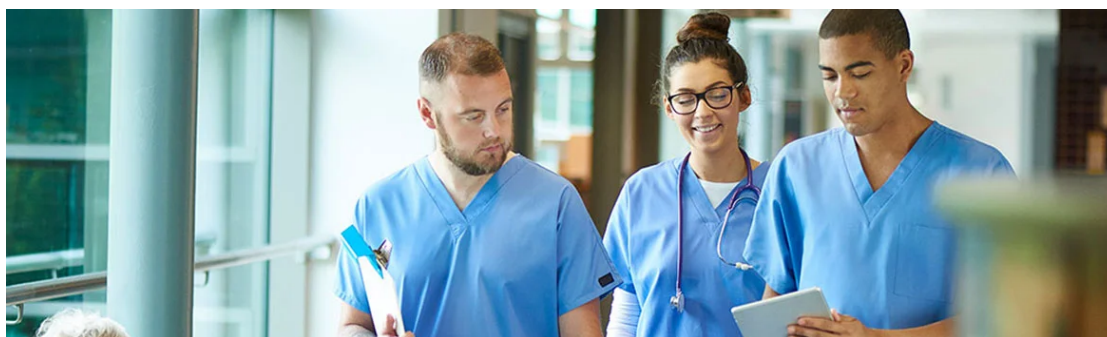
Closed-Loop Communication

Another important topic is closed-loop communication. This is when the person receiving instruction or information repeats it back to make sure the message is understood correctly, and the sender confirms to “close the loop.” It does not require more time, and in fact, it is likely to save time.



Visit the video link below to learn more about the importance of closed-loop communication.

 **AMERICAN HOSPITAL ASSOCIATION**



Closed-Loop Communication | AHA TeamSTEPPS Video Toolkit | AHA

In closed-loop communication, the person receiving instruction or information repeats it back to make sure the message is understood correctly, and the sender confirms to "close the loop." It does not require more time, and in fact, it is likely to save time.

READ MORE AMERICAN HOSPITAL ASSOCIATION >



Complete the content above before moving on.

Knowledge Check. Select and submit the best option in response to the question below.

For official e-mail, a good reminder for constructing your e-mail is FOCUS, which stands for _____.

- ☐ Flight, Organization, Commander, Understanding, and Supervisor
- ☐ Flag, Organized, Current, Ultimate, and Support
- ☐ Focused, Organized, Clear, Understanding, and Support
- ☐ Focus, Original, Concurrent, Understand, and Sympathy

SUBMIT

Knowledge Check. Select and submit the best option in response to the question below.

If you know your call will be lengthy, make sure you ask if the other person has time to _____.

- ☐ talk
- ☐ text
- ☐ visit
- ☐ call back

SUBMIT

Knowledge Check. Input and submit your response into the statement below.

_____ communication is when the person receiving instruction or information repeats it back to make sure the message is understood correctly.

Type your answer here

SUBMIT



Complete the content above before moving on.

Lesson 3: Official Communication and Self-Inspection

After completing this lesson, the student will be able to complete official communications and self-inspections, IAW prescribed guidance and publications.

Preparing a Draft and Finalizing Official Correspondence



As we discussed in the previous lesson, written communication style in the Air Force will be more formal than how you would normally write. Consider the papers that you've written in your education experiences. There are multiple types of written documents that can be produced in the Air Force.

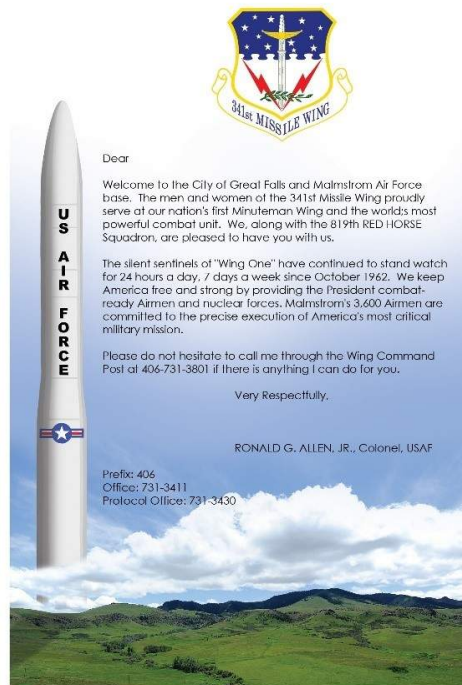


Below are different templates with a summary of how they may be used.

Templates

Personal Letter

Convey official information in a personal manner to a limited number of people.



Templates

Background Paper

Summarizes important content into a single, short document or prepares officials for a speaking engagement. The Talking Paper, Point Paper, and Bullet Background Paper all serve a similar purpose with outline differences.

Background Paper

BACKGROUND PAPER

ON

WRITING BACKGROUND PAPERS

1. The background paper is a multi-purpose communications instrument to transmit ideas or concepts from one office to another. It is an excellent way to express ideas on specific topics and to describe conditions that require a particular staff action. This background paper outlines the basic function and format of a background paper.
2. The primary function of the background paper is to present the background (chronological, problem-solution, etc.) underlying an issue or subject, but it also has other purposes. The background paper has been used to summarize important content into a single, short document or to prepare officials for a speaking engagement by providing them with historical, technical, or statistical background data. There are many other uses as well but all good background papers share some common format attributes for organization, style, and presentation.
3. The organization of a good background paper is no different than that of a point paper, talking paper, or bullet background paper. All these papers open with a purpose that leads to an outline of the main points and ends with a summary, conclusion, or recommendation. The first paragraph of the background paper provides the reader with a clear statement of purpose and an outline or "road map" for the paper. This is followed by the discussion (cohesive, single-idea paragraphs) which leads the reader logically to the conclusion.
4. The style of writing should be professional and in the third person, although writing in first person, active voice will sometimes be more appropriate. Even though the background paper is written in paragraphs, the concise, telegraphic style of the talking paper or bullet background paper is sometimes used (while following the rules of grammar and punctuation for complete sentences and paragraphs). By intent, the background paper is more narrative in style and form; if a shorter format (e.g. bullet background paper or talking paper) will suffice, use it!

Templates

Official Biography

Gives an overview of an Airman, their assignment history, and awards.

AIR FORCE

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[DISPLAY](#)

MAJOR GENERAL MATTHEW WOLFE DAVIDSON

Maj. Gen. Matthew Wolfe Davidson is the Commander, Second Air Force, Keesler Air Force Base, Mississippi. He is responsible for the development, oversight and direction of all operational aspects of basic military training, initial skills training, advanced and supplemental non-flying training for 93 percent of the Air Force across 265 specialties. Second Air Force delivers over 2,700 courses and graduates 150,000 Airmen, Guardians, Soldiers, Sailors, Marines and international students annually. The command includes five training wings at Keesler AFB; Sheppard and Goodfellow AFBs; Joint Base San Antonio-Lackland, Texas; and a network of 103 operating locations around the world.

Maj. Gen. Davidson is a 1993 graduate of Oklahoma State University's Reserve Officer Training Corps program. He is a career Special Tactics Officer and has led air, space and special operations forces during operations Provide Comfort II, Assured Response, Joint Endeavor, Enduring Freedom, Enduring Freedom Philippines, Iraqi Freedom and Freedom's Sentinel. He commanded at the squadron, group and wing levels, led joint operations as the Deputy Commanding General for Special Operations Joint Task Force-Afghanistan, and led U.S. Space Command operations as the Deputy Combined Force Space Component Commander and Vice Commander. He was also the Deputy Commander for Air Force Special Operations Command. Prior to his current assignment, he was the Deputy Director for the Defense Threat Reduction Agency, Fort Belvoir, Virginia.

EDUCATION

1993 Bachelor of Science, Geography, Oklahoma State University, Stillwater, Okla.
2004 Air Command and Staff College, Maxwell Air Force Base, Ala., by correspondence
2004 Master of Science, International Relations, Troy State University, Ala.
2005 Army Command and General Staff College, Fort Leavenworth, Kan.
2006 Master of Military Art and Science, School of Advanced Military Studies, Fort Leavenworth, Kan.
2007 Air War College, Maxwell AFB, Ala., by correspondence
2010 Master of Science, Strategic Studies, Air War College, Maxwell AFB, Ala.
2012 Woodrow Wilson International Center for Scholars, Washington, D.C.
2014 Joint Forces Staff College, Naval Station Norfolk, Va.
2018 Senior Leader Orientation Course, Joint Base Andrews, Md.
2018 Space Operations Executive Course, Peterson AFB, Colo.
2019 National and International Security Leadership Seminar, Washington, D.C.
2019 External Leadership Seminar, Chapel Hill, N.C.

EFFECTIVE DATES OF PROMOTION

Second Lieutenant September 23, 1993	
First Lieutenant September 23, 1995	
Captain September 23, 1997	
Major February 01, 2004	
Lieutenant Colonel September 01, 2007	

Templates

Position Paper

Used to raise a new idea for consideration, advocate a current situation or proposal, or take a stand on an issue.



Position Paper

Written to argue a particular stance on a particular issue.

Usually written for a specific audience with the aim of persuading them to take a certain stance.

Must provide strong evidence to support its stance, whereas other types of writing may have different requirements for evidence.

Has a specific structure: introduction that presents the issue, body that presents arguments and evidence, conclusion that restates the position.

The tone of a position paper is typically argumentative and persuasive.



Templates

Official Memorandum

Finally, the official memorandum will be the template that you will use most often; and we will go into more depth in the following lesson. The official memorandum can be used to communicate a variety of things such as policies at all levels, information, appointing program leads, etc.

Drafting most official documents has become increasingly easy.



DEPARTMENT OF THE AIR FORCE
(APPROVED ORGANIZATIONAL LETTERHEAD)

[1.75 inches from top of page; flush with the right margin] 15 January 2014

MEMORANDUM FOR ORG/SYMBOL ¶ [Second line below date]

FROM: ORG/SYMBOL ¶ [Second line below MEMORANDUM FOR]

Organization

Street address (see paragraph 4)

City ST 12345-6789 (see paragraph 4)

SUBJECT: Format for the Official Memorandum ¶ [Second line below FROM]

References: (a) AFM 33-326, 25 November 2011, *Preparing Official Communications*. ¶
(b) DoDM 5110.04-M-V2, October 26, 2010, *DoD Manual for Written Material*. ¶

1. Use only approved organizational letterhead for all correspondence. This applies to all letterhead, both pre-printed and computer generated. Reference (a) details for the format and style of official letterhead such as centering the first line of the header 5/8ths of an inch from the top of the page in 12 point Copperplate Gothic Bold font. The second header line is centered 3 points below the first line in 10.5 point Copperplate Gothic Bold font. ¶
2. The standard location for the date element is 1.75 inches from the top of the page and flush with the right margin whether it is placed by word processor, typewriter, or date stamp. ¶
3. Place "MEMORANDUM FOR" on the second line below the date. Leave two spaces between "MEMORANDUM FOR" and the recipient's office symbol. If there are multiple recipients, two or three office symbols may be placed on each line aligned under the entries on the first line. If there are numerous recipients, use a "DISTRIBUTION" element. ¶
4. Place "FROM:" on the second line below the "MEMORANDUM FOR" line. Leave two spaces between the colon in "FROM:" and the originator's office symbol. The "FROM:" element contains the full mailing address of the originator's office unless the mailing address is in the header or if all the recipients are located on the same installation as the originator. ¶
5. Place "SUBJECT:" in uppercase on the second line below the last line of the FROM element. Leave two spaces between the colon in "SUBJECT:" and the subject. Capitalize the first letter of each word except articles, prepositions, and conjunctions (this is sometimes referred to as "title case"). Be clear and concise. If the subject is long, try to revise and shorten the subject; if shortening is not feasible, align the second line under the first word of the subject. ¶
6. Body text begins on the second line below the last line in the subject element and is flush with the left margin. If the Reference element is used, then the body text begins on the second line below the last line of the Reference element. ¶



NOTE: You may download drafts for all these documents via the Air Force E-Publishing website at <https://www.e-publishing.af.mil/>.

CONTINUE

The most common document that you create on your own is the official memorandum. As you draft and finalize this document, consider these questions:

- What is the purpose of your document and who will read it?
- Do you have all the facts and supporting documents?
- Is your document organized and easy to read?
- Have you reviewed and edited the document?
- Have you given the document to someone else for their review and edit?

This may seem like a lot of questions, but you will find that these will be answered as you draft your document.

Now that you're ready to finalize the document, what should you look for?

1

Ensure that your document has the correct letterhead for your unit and the Air Force seal.

2

Use 1-inch margins for the left, right and bottom of the document.

3

The heading section has a date and then the following:

- MEMORANDUM FOR
- FROM
- SUBJECT
- References (as applicable)

4

Text starts on the second line below the subject or references (if used) and number each paragraph, and letter sub-paragraphs.

5

Double space between paragraphs and sub-paragraphs.

6

Check for correct spelling and grammar.

7

If the memorandum is more than two pages, insert page numbers.

8

The signature block will be on the fifth line below the last line of text, 4.5 inches from the left edge of the page. The template displayed will be used.



Below is an Official Memorandum example. More details are located in AFH 33-337, *The Tongue and Quill*.



DEPARTMENT OF THE AIR FORCE
HEADQUARTERS UNITED STATES AIR FORCE

2 February 2004

MEMORANDUM FOR: HQ AETC/IM
HQ AU/IM

FROM: HQ USAF/SCMV
1250 Air Force Pentagon
Washington DC 20330-1250

SUBJECT: Format of the Air Force Official Memorandum (Your Memo, 15 Jan 03)

References: (a) AFMAN 33-326, *Preparing Official Communications*
(b) AFH 33-337, *The Tongue and Quill*

1. This is a prepared letterhead format of the Air Force official memorandum. The heading will be generic consisting of two or three lines: Department of the Air Force, etc., and the organization (Headquarters Air Combat Command, Headquarters United States Air Force, etc.), and the location with the ZIP code (optional). Printed letterhead stationery for wing level is normally used if the quantity needed justifies the printing cost. Any unit without its own letterhead may use its parent unit's and identify its organization and office symbol in the FROM caption. Be sure to include the 9-digit ZIP code with the full address in the FROM caption.
2. The style of writing is yours. For some helpful guidelines see pages 17-24. However, when writing for someone else's signature, try to write as though that person were speaking. Be succinct, use active voice and keep it short (one page, if possible, see Atch 1). Include extensive background material as an attachment rather than within the memorandum itself (see Atch 2).
3. Even though most signers want their signatures on a perfect product, minor errors may be neatly corrected in ink.
4. If you want a response directed to a project officer rather than the signer, include that person's name and rank (if applicable), office symbol, telephone number and e-mail in the body of the memo.

Shirley Collins
SHIRLEY COLLINS
Management Analyst
Visual Information/Publishing Division

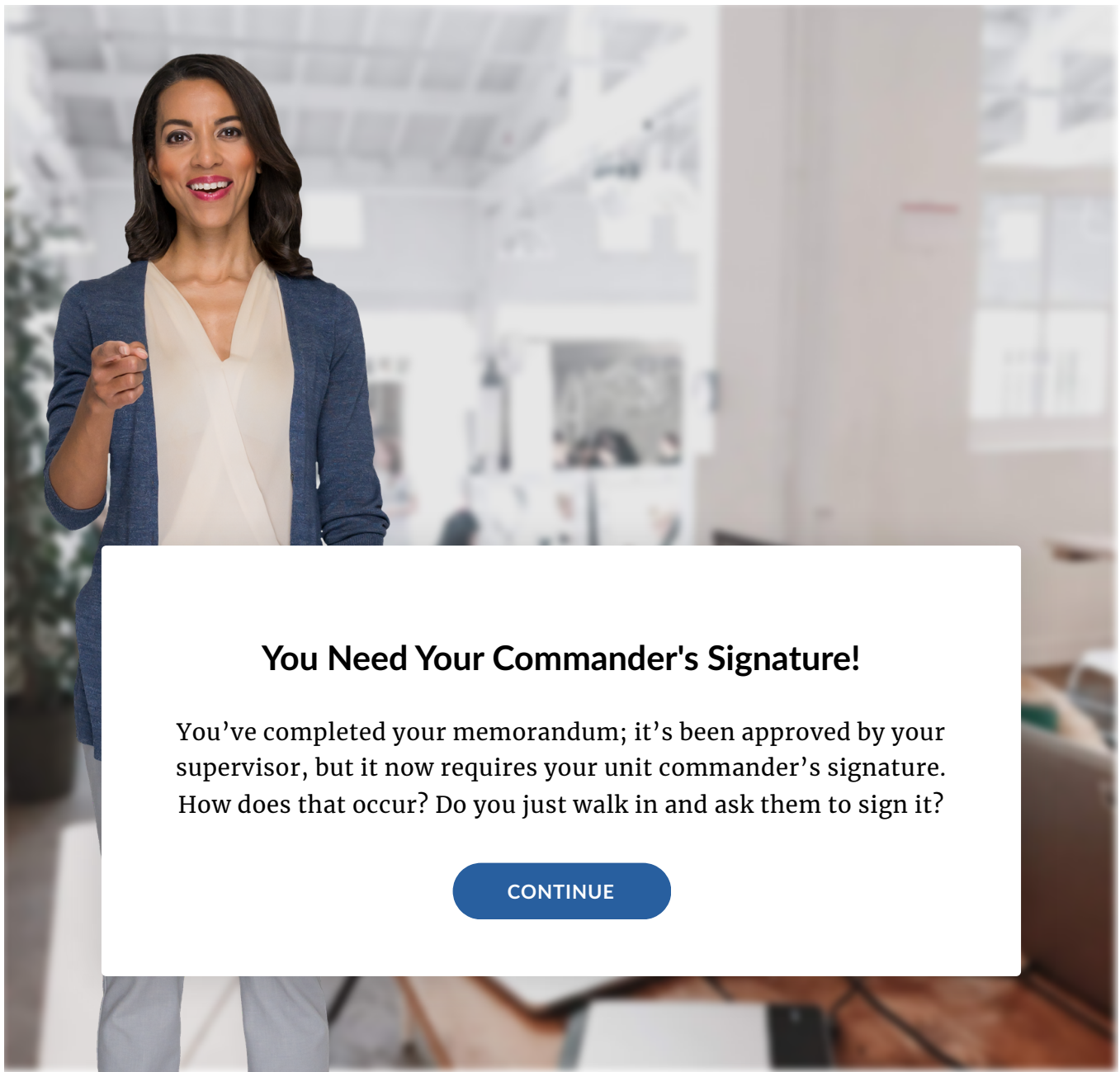
- 2 Attachments:
1. Minutes, 28 Dec 03
 2. HQ AF/ILCXE Memo, 15 Dec 03

cc:
HQ AETC/DP

CONTINUE



Click through the e-SSS scenario below to learn tips about gaining your commander's signature.



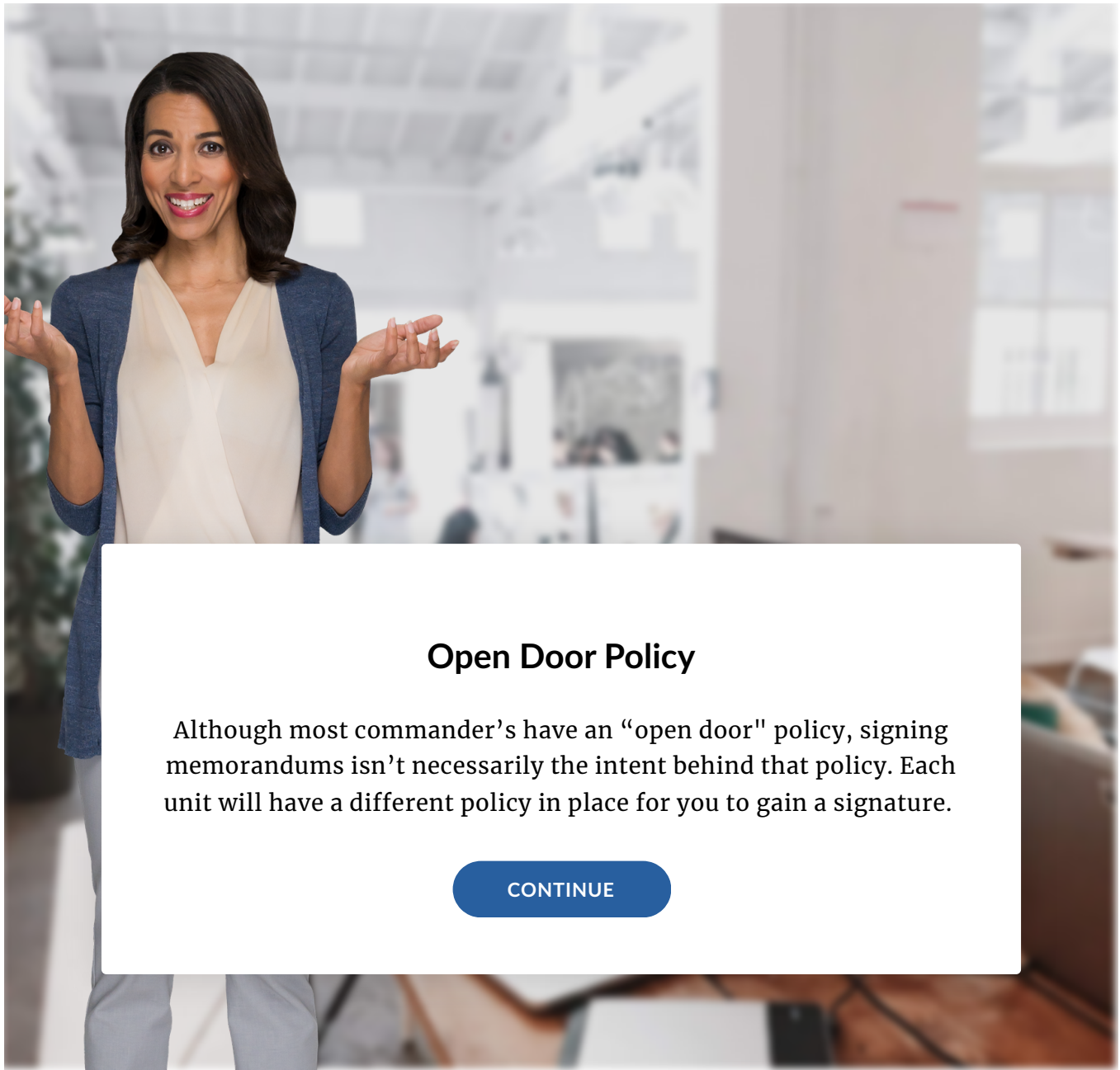
You Need Your Commander's Signature!

You've completed your memorandum; it's been approved by your supervisor, but it now requires your unit commander's signature. How does that occur? Do you just walk in and ask them to sign it?

CONTINUE

Scene 1 Slide 1

Continue → Next Slide



Open Door Policy

Although most commander's have an "open door" policy, signing memorandums isn't necessarily the intent behind that policy. Each unit will have a different policy in place for you to gain a signature.

CONTINUE

Scene 1 Slide 2

Continue → Next Slide



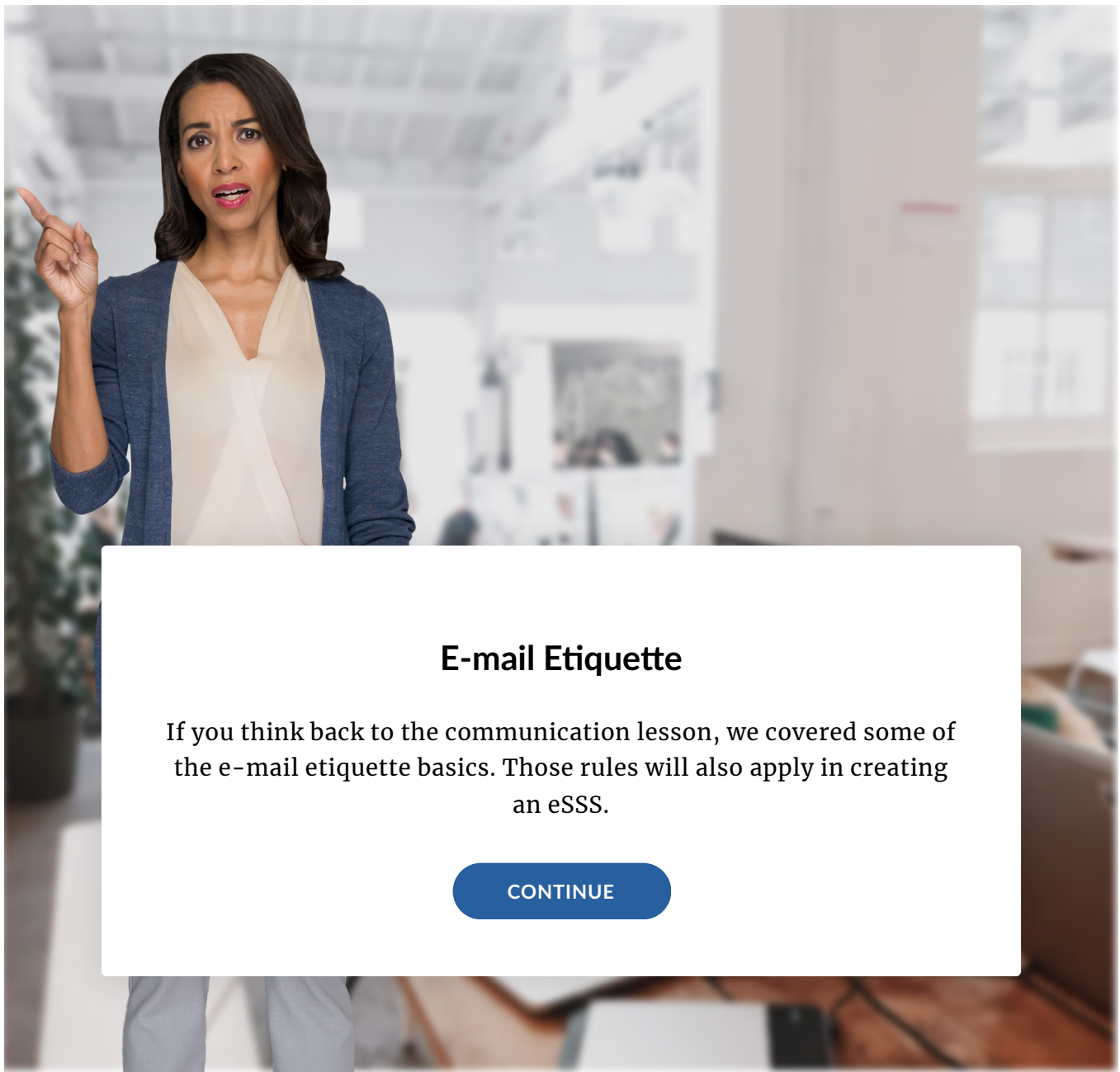
Staff Summary Sheet (SSS)

One of the most common ways for documents to be reviewed and routed to the commander is the Staff Summary Sheet (SSS). These are typically routed electronically which is referred to as an eSSS.

CONTINUE

Scene 1 Slide 3

Continue → Next Slide



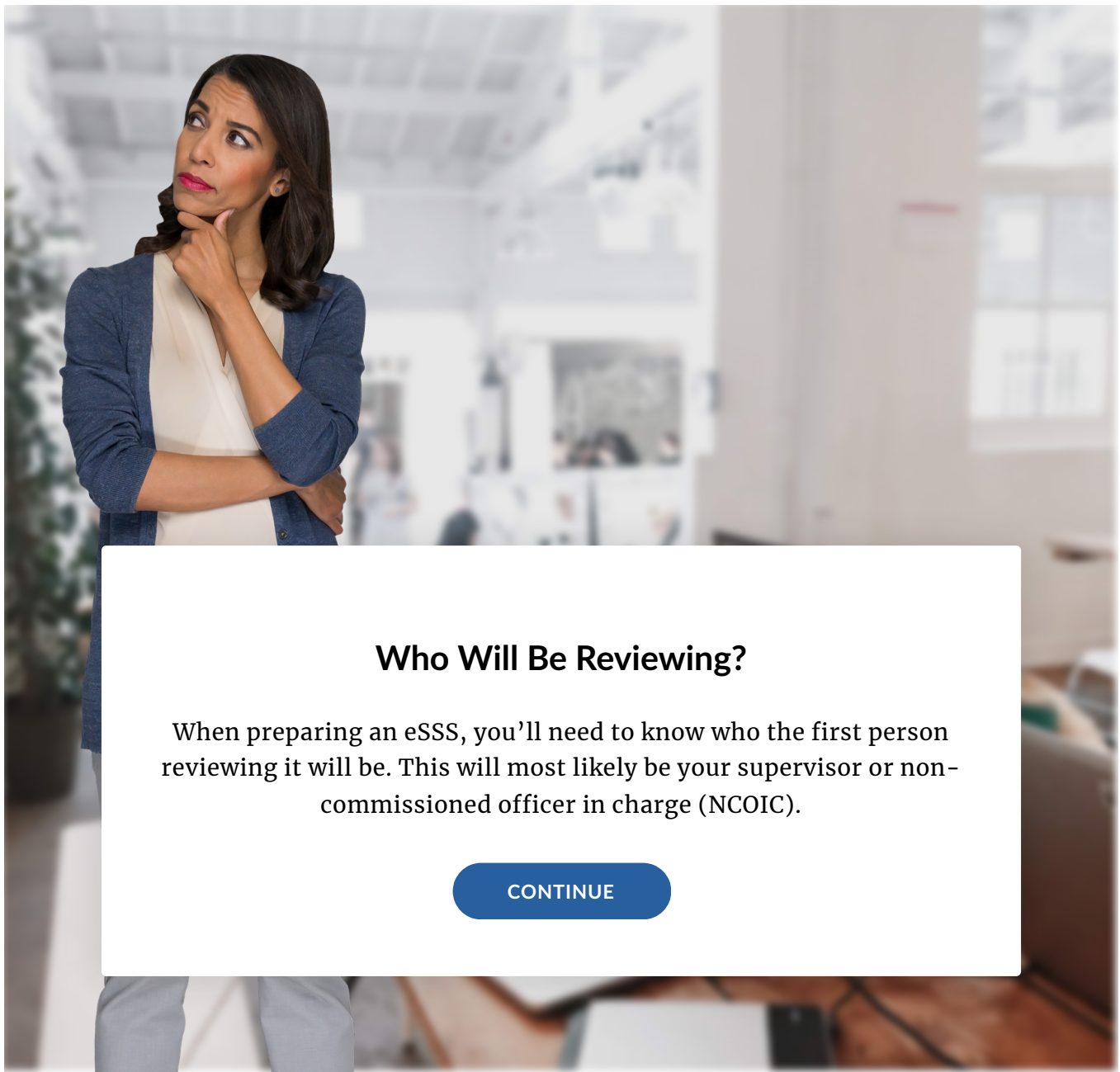
E-mail Etiquette

If you think back to the communication lesson, we covered some of the e-mail etiquette basics. Those rules will also apply in creating an eSSS.

CONTINUE

Scene 1 Slide 4

Continue → Next Slide



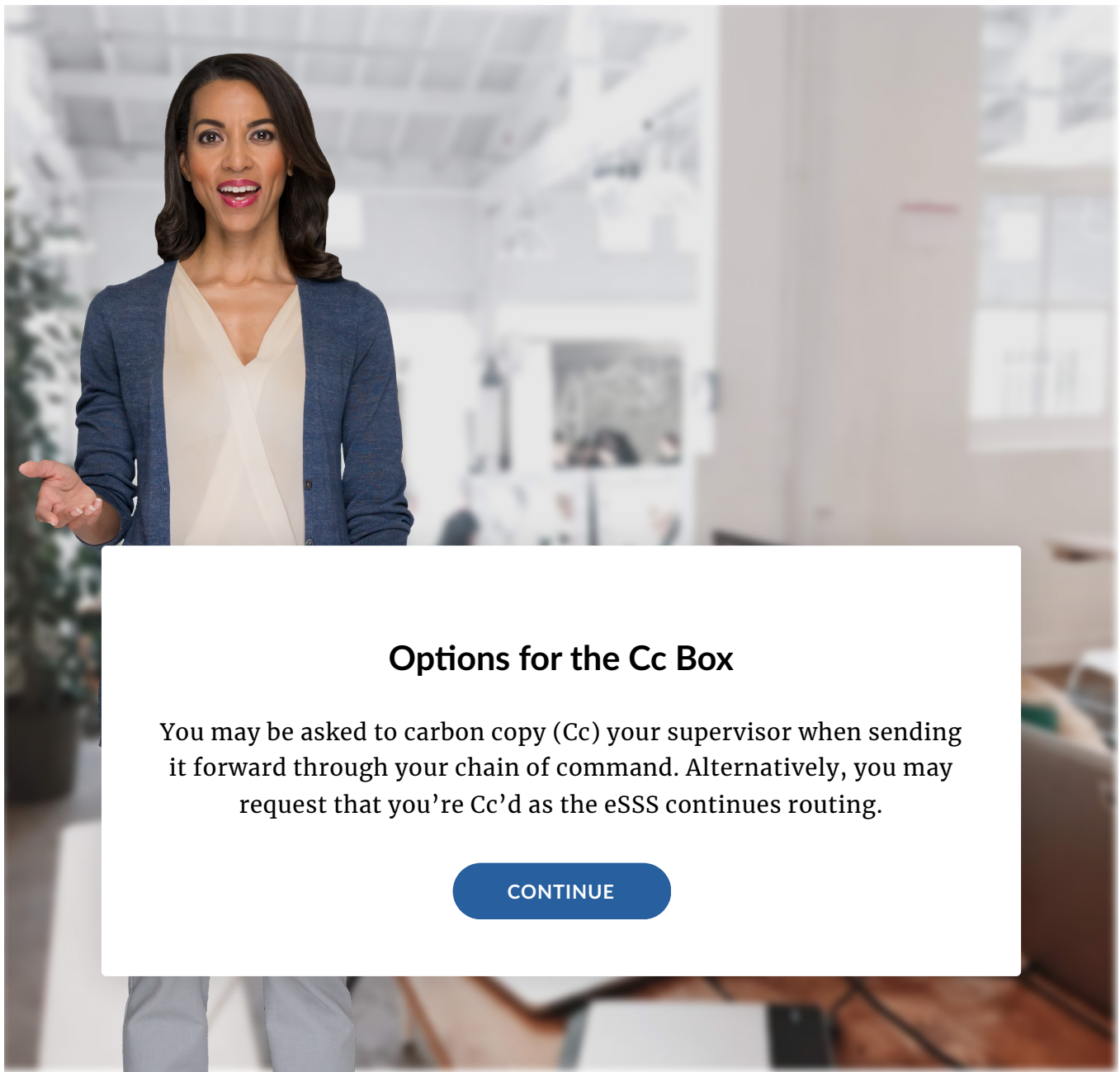
Who Will Be Reviewing?

When preparing an eSSS, you'll need to know who the first person reviewing it will be. This will most likely be your supervisor or non-commissioned officer in charge (NCOIC).

CONTINUE

Scene 1 Slide 5

Continue → Next Slide



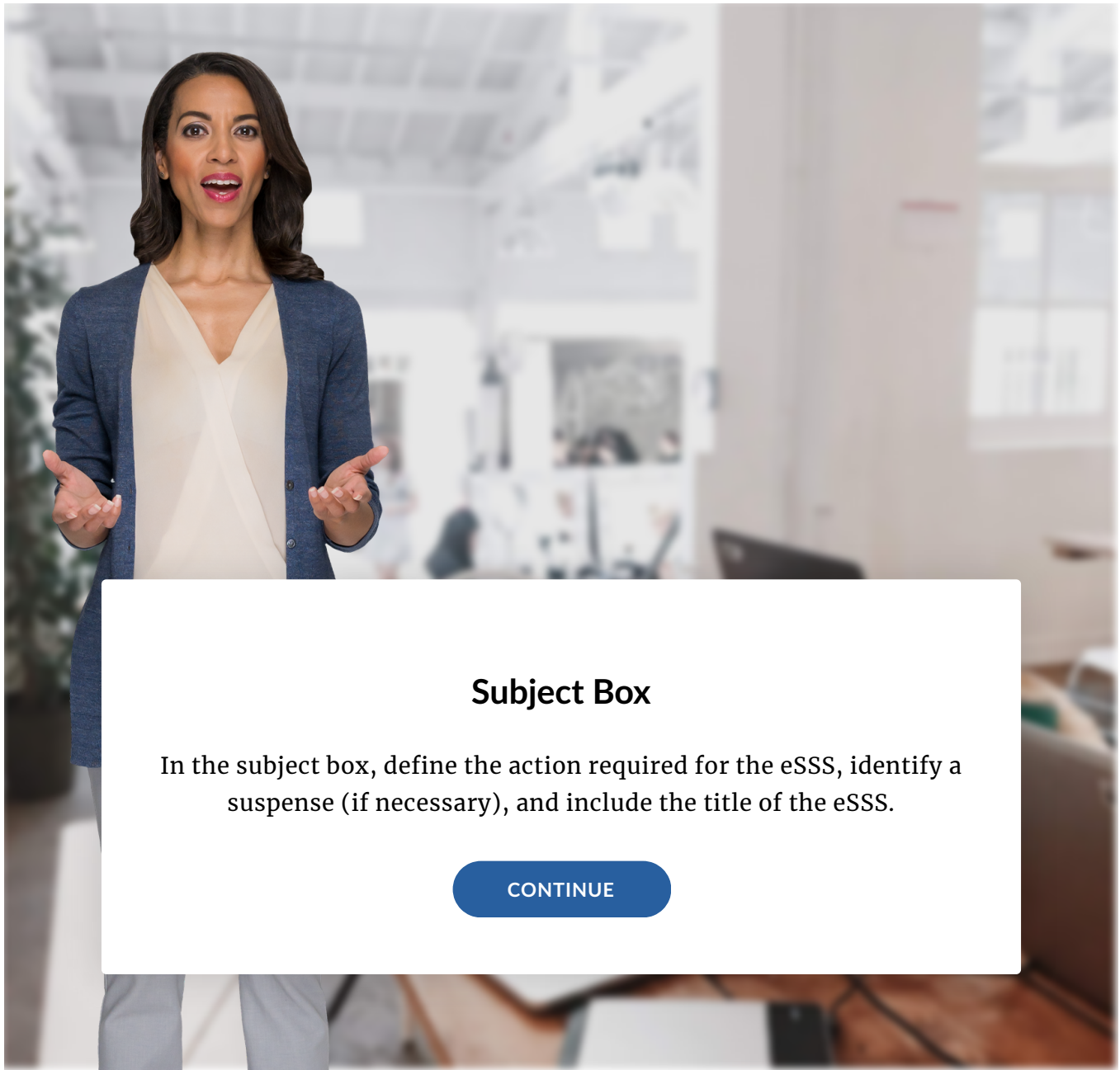
Options for the Cc Box

You may be asked to carbon copy (Cc) your supervisor when sending it forward through your chain of command. Alternatively, you may request that you're Cc'd as the eSSS continues routing.

CONTINUE

Scene 1 Slide 6

Continue → Next Slide



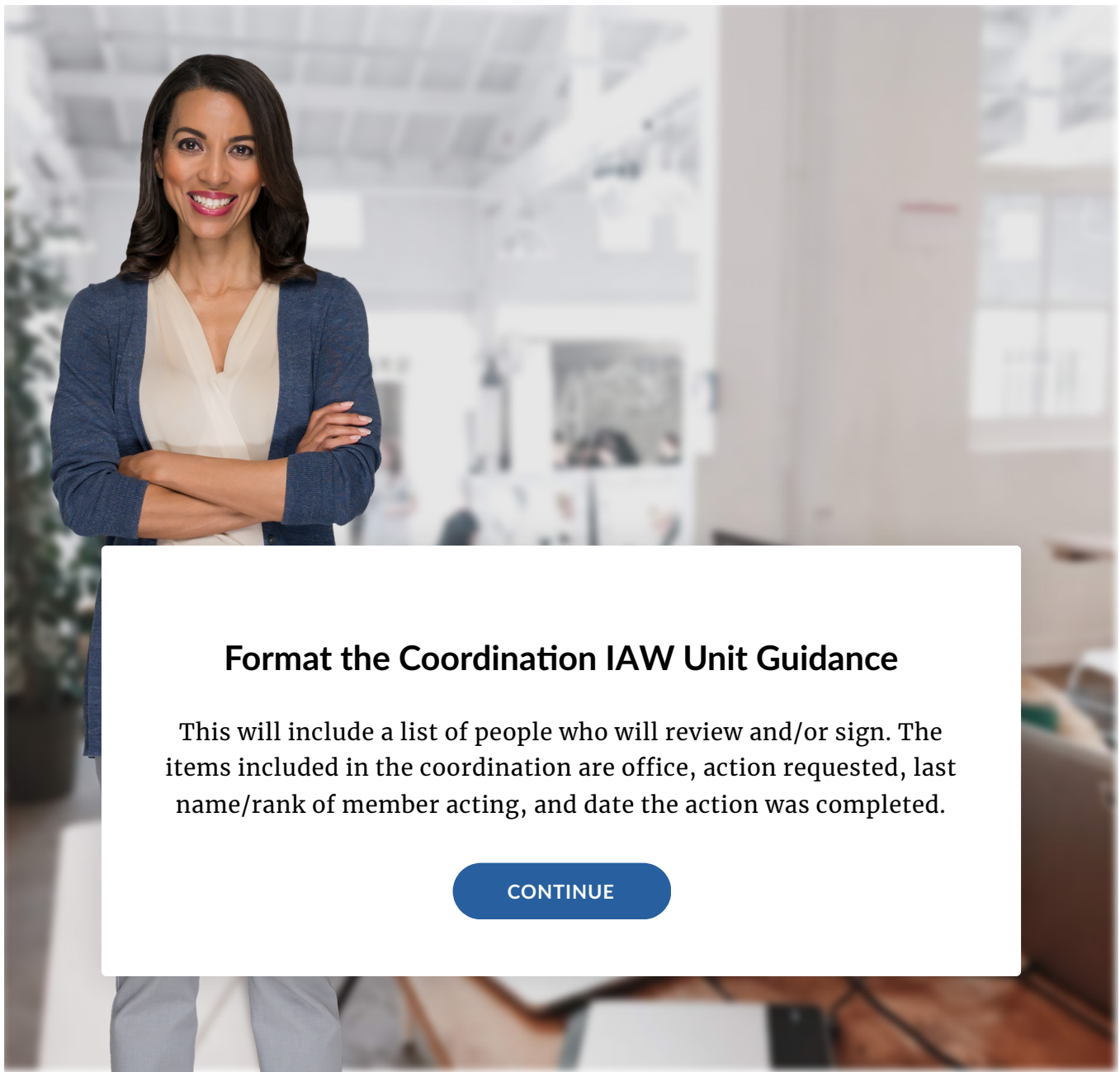
Subject Box

In the subject box, define the action required for the eSSS, identify a suspense (if necessary), and include the title of the eSSS.

CONTINUE

Scene 1 Slide 7

Continue → Next Slide



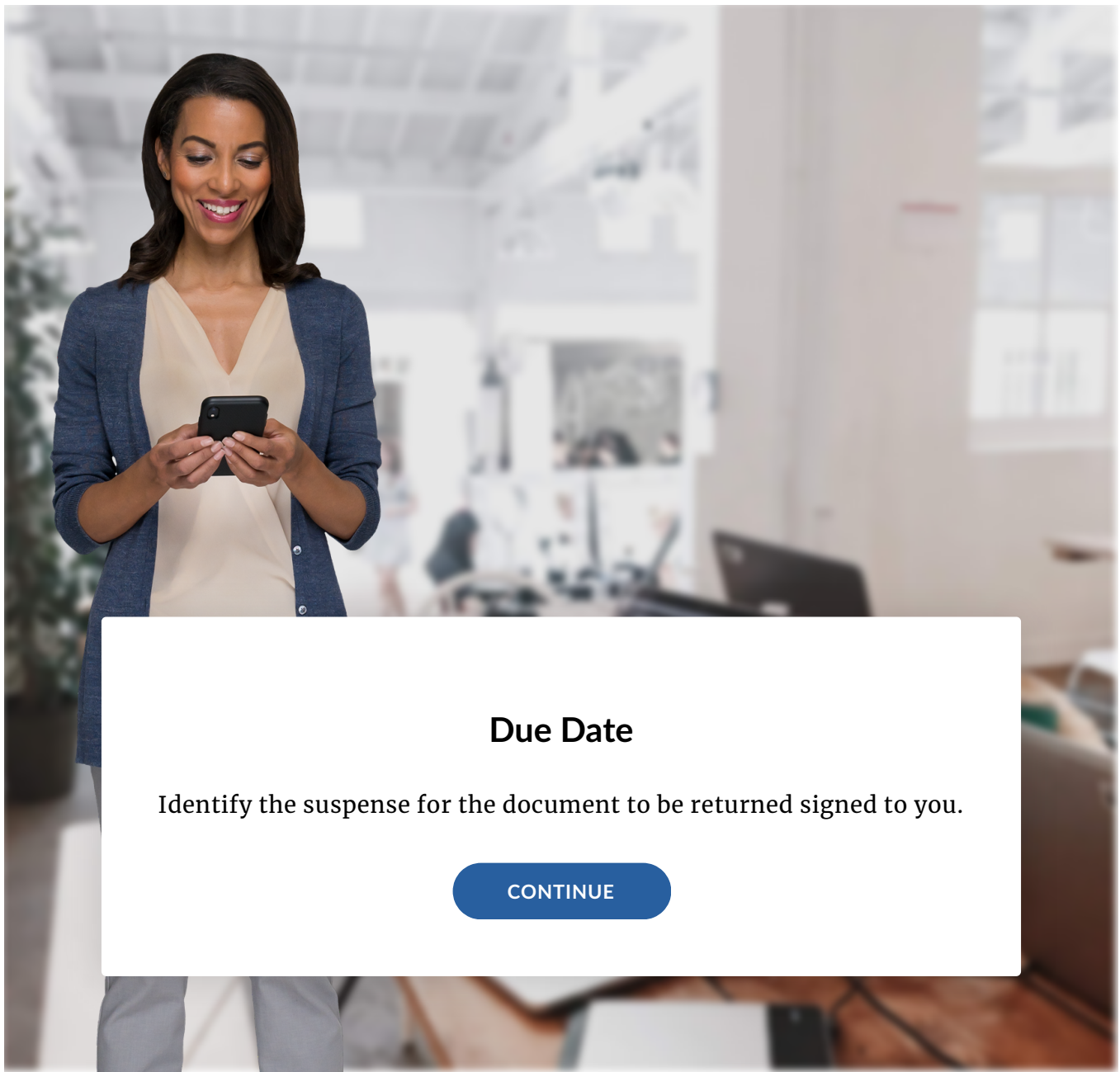
Format the Coordination IAW Unit Guidance

This will include a list of people who will review and/or sign. The items included in the coordination are office, action requested, last name/rank of member acting, and date the action was completed.

CONTINUE

Scene 1 Slide 8

Continue → Next Slide



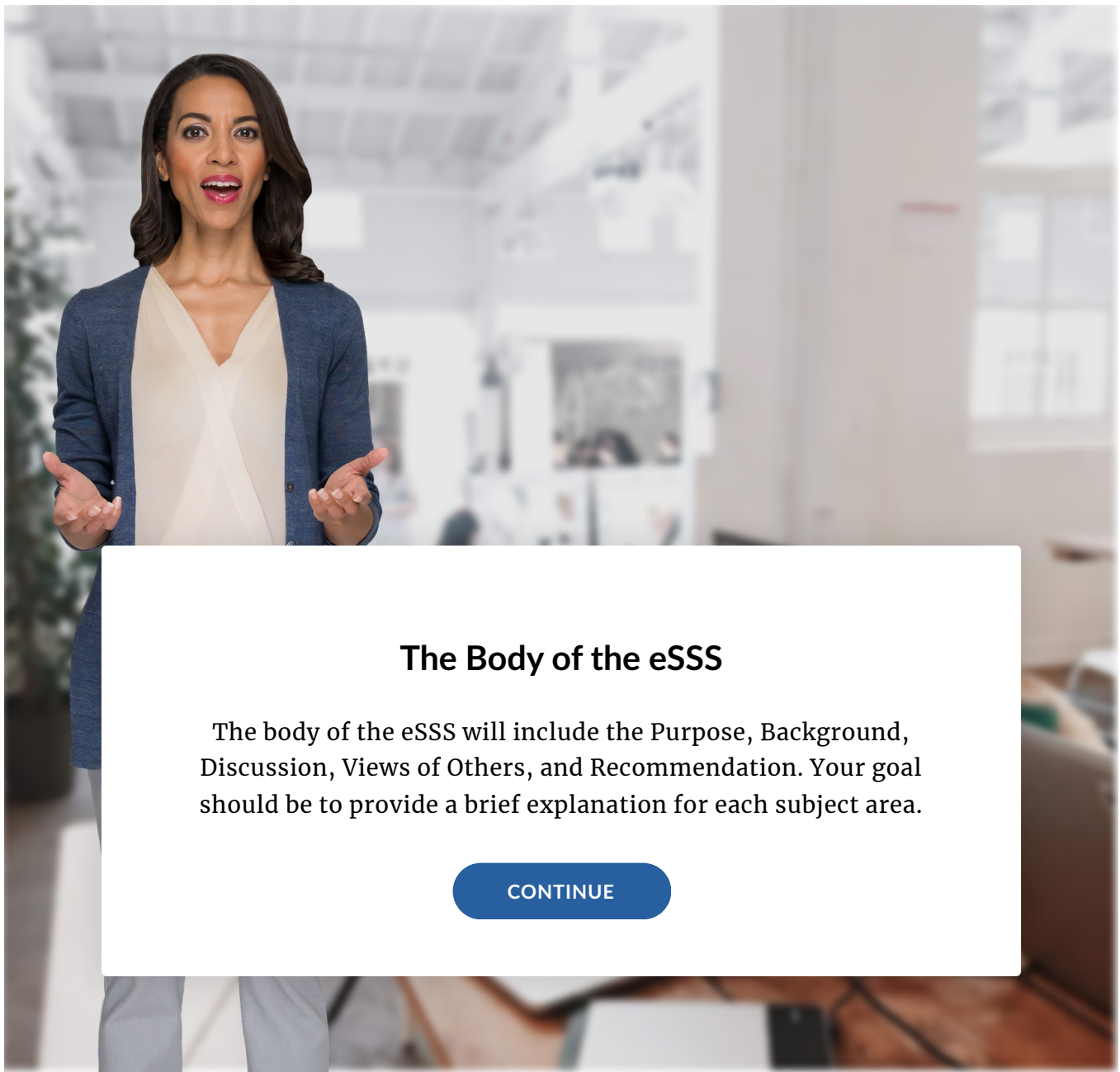
Due Date

Identify the suspense for the document to be returned signed to you.

CONTINUE

Scene 1 Slide 9

Continue → Next Slide



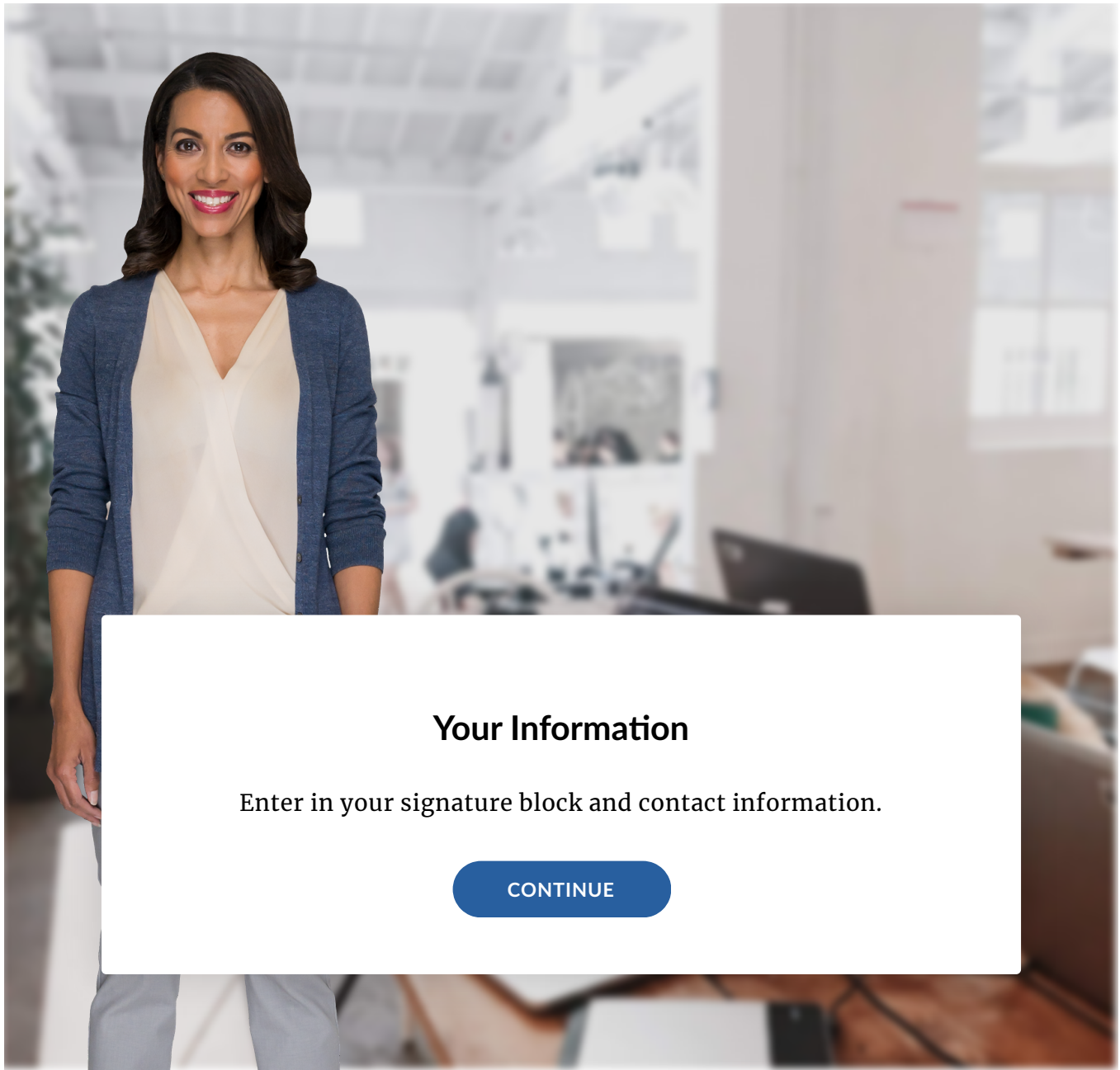
The Body of the eSSS

The body of the eSSS will include the Purpose, Background, Discussion, Views of Others, and Recommendation. Your goal should be to provide a brief explanation for each subject area.

CONTINUE

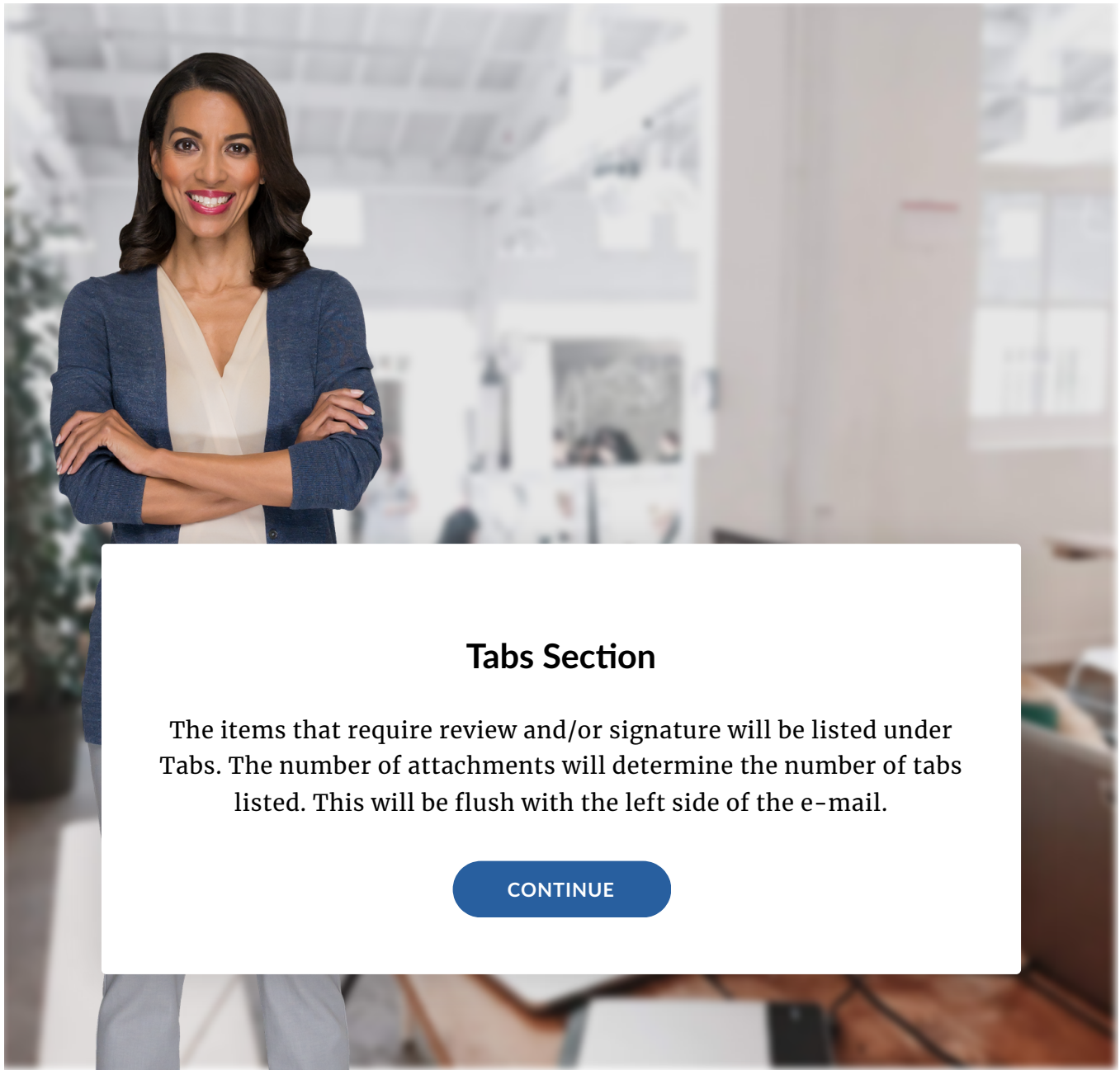
Scene 1 Slide 10

Continue → Next Slide



Scene 1 Slide 11

Continue → Next Slide



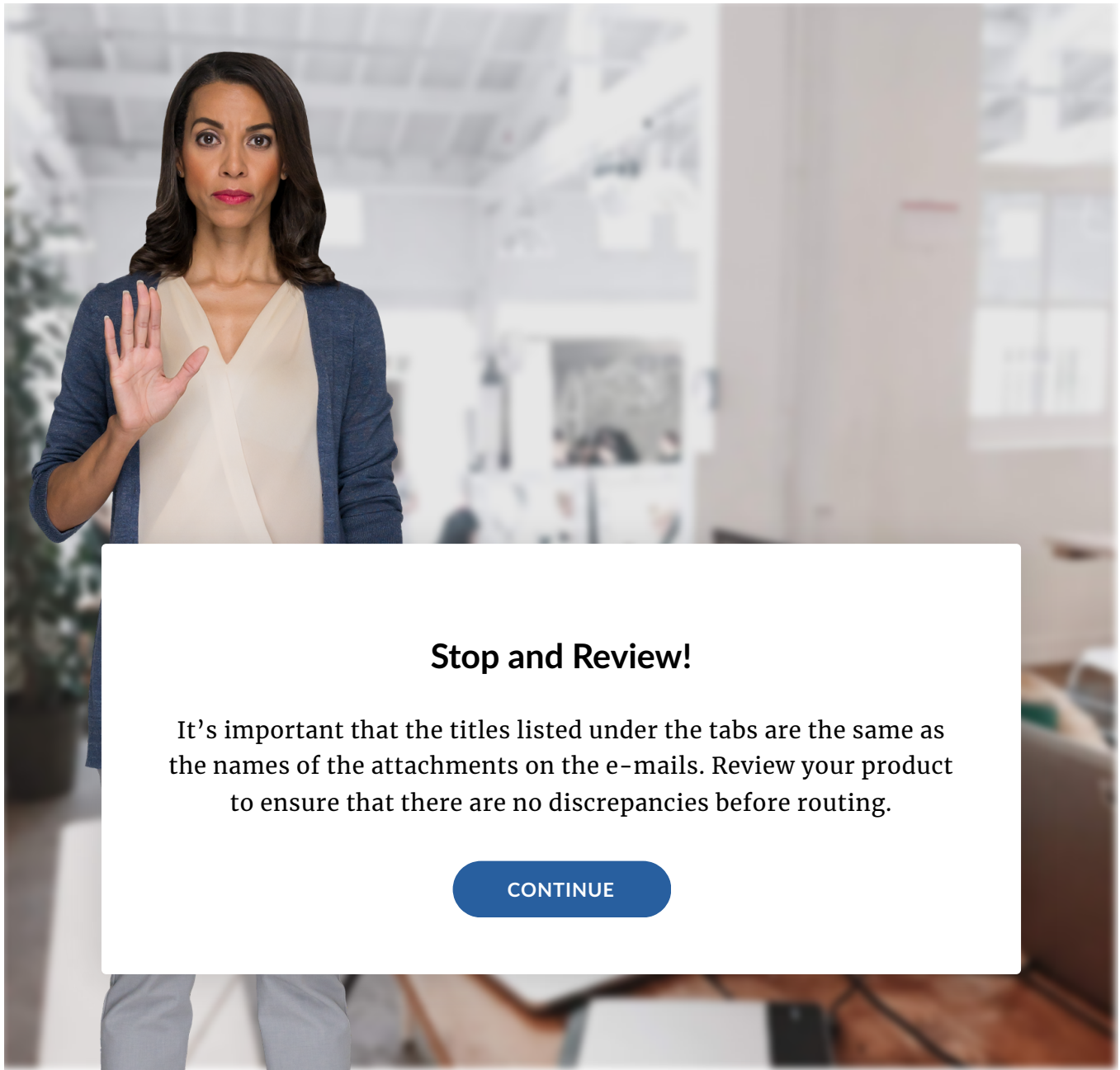
Tabs Section

The items that require review and/or signature will be listed under Tabs. The number of attachments will determine the number of tabs listed. This will be flush with the left side of the e-mail.

CONTINUE

Scene 1 Slide 12

Continue → Next Slide



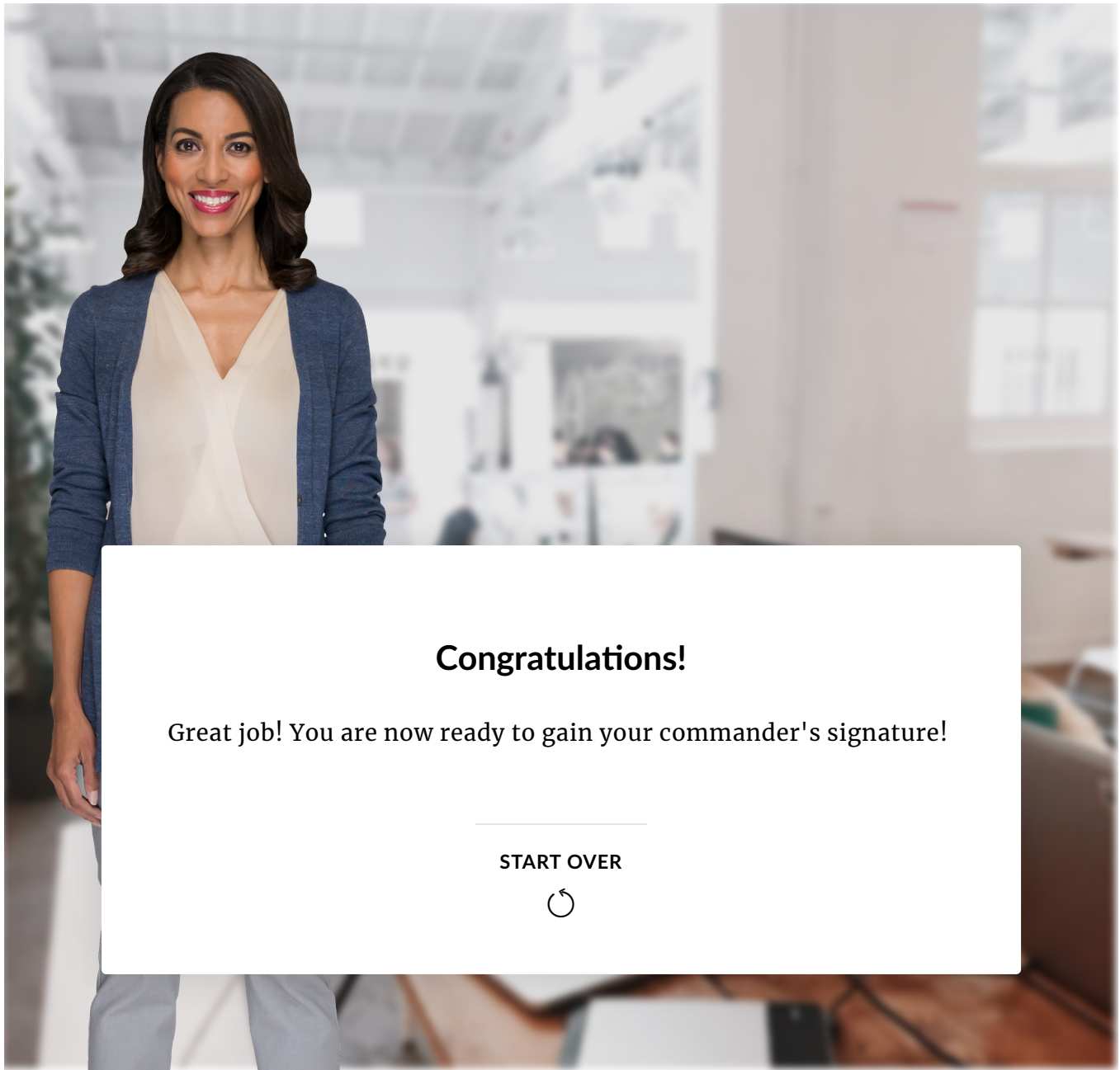
Stop and Review!

It's important that the titles listed under the tabs are the same as the names of the attachments on the e-mails. Review your product to ensure that there are no discrepancies before routing.

CONTINUE

Scene 1 Slide 13

Continue → Next Slide



Congratulations!

Great job! You are now ready to gain your commander's signature!

START OVER



Scene 1 Slide 14

Continue → End of Scenario



Complete the content above before moving on.

The inspection system is one of the most important systems within the Air Force. It may not seem like it at first view, but this system allows commanders to determine the “health” of their unit.



Unit Health

What does it mean when we say “health” of the unit? This means the unit has effective leadership, personnel are happy to work there and/or find purpose in their work, the unit can execute their mission, and there is minimum fraud and abuse. Now that you have a better understanding of what the system measures you can appreciate why it is so important!

Air Force Inspection Agency (AFIA)

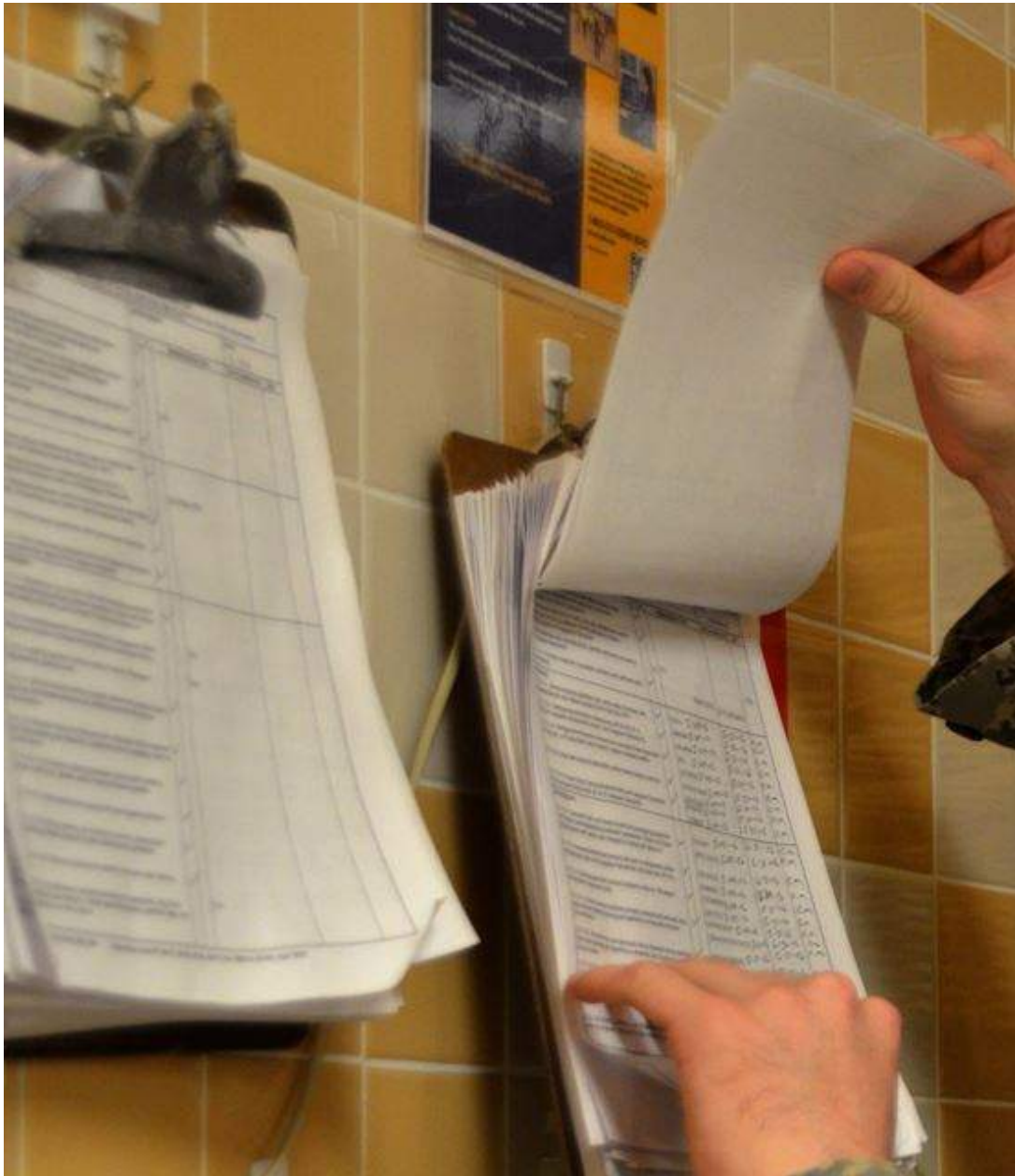
AFIA oversees the inspection system. When there are Air Force level inspections at your base, you will see personnel from this agency. Wing-level Air Force inspections are led by the base's Inspector General (IG) office.



Self-Inspection Program and Applicable Systems

One of the areas you may need to coordinate communication is when you conduct self-inspections on your program. A self-inspection is a tool for leadership to evaluate programs and processes that impact the delivery of safe, quality healthcare in their area of responsibility (AOR). Self-inspections are everyone's responsibility. Every program should be inspected and updated in the appropriate system.

Most standards for self-inspection are updated at least annually by their accrediting source. Updates require attention to ensure we meet our beneficiary and AFMS expectations for the highest quality of healthcare. The military treatment facility (MTF) leadership has a continuous self-inspection process that is in place for accurately and completely monitoring compliance standards as outlined by Air Force Medical Readiness Agency (AFMRA), the MAJCOMs, and other national accreditation bodies as required.



Below are common elements you should be familiar with for a self-inspection program.

This is a tool for leadership to evaluate programs and processes that impact the delivery of safe, quality healthcare in their AOR. Most standards for self-inspection are updated at least annually by their accrediting source and require vigilant attention to ensure we meet our beneficiary and AFMS expectations for the highest quality of healthcare.

Inspection Guidelines

Self-inspections are primarily compliance based and conducted using checklists comprised of the Major Graded Areas (MGA). These are Managing Resources, Leading People, Improving the Unit, and Executing the Mission. MGAs represent key processes, procedures, and requirements based on public law, executive orders, directives and instructions.

Management Internal Control Toolset (MICT)

A system that provides supervisors and the command chain visibility into compliance reports and programs status as well as indications of program health across functional and command channels. It also is a record to communicate a unit's program health using a self-assessment communicator.

Unit Effectiveness Inspection (UEI)

The Unit Effectiveness Inspection (UEI) is an external continual evaluation of Wing performance based on the four MGAs. The UEI integrates elements of compliance and readiness to create a comprehensive assessment of unit effectiveness. The UEI is a "photo album" instead of a "snapshot" of a unit's performance and capabilities over the UEI period.

The Joint Commission (TJC)

An independent, not-for-profit organization, TJC maintains state-of-the-art standards that focus on improving the quality and safety of care provided by healthcare organizations. TJC's comprehensive accreditation process evaluates an organization's compliance with these standards and other accreditation requirements. Their website has multiple tools and frequently asked questions to assist organizations in compliance.



Complete the content above before moving on.

Knowledge Check. Input and submit your response into the statement below.

The _____ paper summarizes important content into a single, short document or prepares officials for a speaking engagement.

Type your answer here

SUBMIT

Knowledge Check. Select and submit the best option in response to the question below.

The official _____ will be the template that you will use most often.

- ☐ personal letter
- ☐ background paper
- ☐ position paper
- ☐ memorandum

SUBMIT

Knowledge Check. Select and submit the best option in response to the statement below.

A self-inspection is a tool for leadership to evaluate programs and processes.

- ☐ True

☐

False

SUBMIT



Complete the content above before moving on.