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MANUAL TRANSMITTAL SHEET

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Subject

1221-1 – Writing and Formatting Directives Handbook

1. Explanation of Material Transmitted: This release transmits the revised 1221-1 Writing and Formatting Directives Handbook ("Handbook"). This revision updates the Handbook to keep pace with changes made to the Directives Manual. Changes have been made to the organization, table of contents, section numbers, and pagination used in BLM manuals. These changes are reflected in the revised Handbook.

2. Reports Required: None.

3. Material Superseded: This release supersedes the BLM 1221-1 Writing and Formatting Directives Handbooks released in July of 1986.

4. Filing Instructions: File as directed below.

REMOVE	INSERT
All of 1221 (Rel. 1-1464) (Total 42 pages)	All of the Revised 1221-1 (Total 45 pages)

Assistant Director,
Information Resources Management

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CHAPTER I - WRITING DIRECTIVES

A. General Requirements.

1. **Contents.** Authors are responsible for preparing directives that are complete, concise, consistent, and easy-to-understand. Organize material in a logical sequence. Keep in mind the reader's point-of-view and how the reader will logically utilize the material presented. Cover one subject in one place; for example, use one paragraph, section, or chapter, depending on the scope of the subject.

2. **Write an Effective Directive.** Directives are the primary means of communicating new or revised policy, instructions, and information to BLM employees. An effective directive must be:

   a. **Correct.** Get all the facts. Make sure that the responsibilities and procedures do not conflict with those in other directives. Ensure that citations of authority are current and accurate.

   b. **Complete.** Include enough detail to minimize the need to check other directives for further information or instructions to save the reader time. When writing a Manual Section (MS), ensure that valid Instruction Memoranda (IMs) are consolidated into the Manual Section. Tell who performs what task; when they are to do it; and, if appropriate, tell employees where, how, and why they should do something.

   c. **Clear.** Write so that the reader can understand the message you are trying to communicate through the directive. Use plain language. In describing a series of actions that must be taken, specify who must do what, clearly.

   Logically organize the content of the directive. Cover one subject in one place. Use key words to provide brief, descriptive headings for paragraphs and subparagraphs so that the reader can skim the material and quickly understand the directive's format and organization.

   d. **Concise.** Do not include more detail than necessary to communicate the information or instruction.

   e. **Concrete.** Choose words that express your meaning precisely.

   f. **Compatible with its Audience.** Consider the audience and the subject material to determine how much instruction and detail is needed in the directive. A common error in directives writing is assuming that readers know more than they do about the specific subject. Provide sufficient background.

B. Organizing the Directive.

Directives must be organized to be consistent with the formats stated in this Handbook, and may be organized in several different ways, including:

1. **By User Group**. Use this organization when multiple officials are involved in performing an action. It enables each office to identify quickly those elements of text applicable to their office.

2. **By Order of Importance or Generality.** Place the most important or general subjects first to highlight policy and procedure.
3. **By Frequency of Use.** Group seldom-used instructions together. Consider using an appendix in BLM Manual Sections or Handbooks or an attachment in IMs or IBs for lengthy procedures or infrequently encountered situations.
4. **By Frequency of Change.** For BLM Manual Sections and Handbooks, group together, to the extent possible, frequently changed material. This makes it easier to make changes later.

C. General Writing Rules.

1. **Simple Words.** Use short, familiar, concrete words.
2. **Word Meanings.** Certain words have particular meanings associated with them:
   a. **"Must"** indicates a mandatory requirement. "**Must not"** means that the action is absolutely prohibited.
   b. **"Should"** indicates suggested action. The action is desirable but not mandatory.
   c. **"May"** and **"can"** indicate that the suggested action is optional.
   d. **"Will"** conveys only future tense and implies little urgency in carrying out a directive.
   e. Do not use the word **"shall"** in BLM directives. **"Shall"** is an ambiguous word that can alternately convey obligation or simple future action. Use **"must"** to indicate mandatory action, and **"will"** to indicate future tense.
3. **Avoiding Gender-Specific Terminology.** Avoid, if possible, the use of the pronoun **he** or **she** when a person of either sex is meant. The following guidelines provide some suggested changes:
   a. Use **one**, **person**, **individual**, or the job title.
   b. Use plural nouns and **they** or **their** if the meaning will be unaffected.
   c. Eliminate the pronoun if the sentence will remain grammatically correct without it.
   d. Repeat the noun instead of using the pronoun.
   e. Rearrange the sentence to eliminate the need for the pronoun.
4. **Action Verbs.** Sentences must contain action verbs that are short and direct.

Figure 1 - Action Verbs

Use	Avoid
consider	give consideration to
know	have knowledge of
applies	is applicable

5. **Second Person Imperative.** Use the understood second person to provide simple, direct, unequivocal sentences. Second person imperative gives orders.

Figure 2 - Second Person Imperative

MAKE an inventory.
EVALUATE all alternatives.
KEEP a record of maintenance inspections.

6. **First Person Personal Nouns.** First person personal nouns (I, me, our, us, or we) may only be used in question and answer format. Questions are generally stated in first person.
7. **Active Voice.** Use the active voice rather than the passive voice whenever possible to write easy-to-understand sentences. Be sure to state who the actor or responsible party is when using the passive voice (e.g., by the State Director in the example below).

Figure 3 - Active and Passive Voice

Use Active Voice - The State Director approves the plan.
Avoid Passive Voice - The Plan is approved by the State Director.

8. **Present Tense.** A directive is in effect as of the date of its issuance. Therefore, directives are written in the present tense.

Figure 4 - Present and Future Tense

Use Present Tense - The Director IS responsible for ensuring compliance.
Avoid Future Tense - The Director WILL BE responsible for ensuring compliance.

9. **Sentence Structure.** Place modifiers next to the words they modify. Keep subject/verb/object relationships simple.

Figure 5 - Subject/Verb/Object Sentence Structure

The Budget Officer	**submits**	**the revised estimate**.
Subject	Verb	Object

10. **Sentence Length.** Try to keep sentences short; limit them to one idea. Eliminate unnecessary words.

11. **Positive and Negative Statements.** Unless warning about common errors or damaging outcomes, state an idea positively rather than negatively.

Figure 6 - Positive and Negative Statements

Positive Statement - The Official must select a candidate from the list of eligible employees.
Negative Statement **-** The Official may not select a candidate who is not on the list of eligible employees.

12. **Parallel Construction.** Use nouns, verbs, tenses, voices, phrases, and sentences that are parallel in construction.

Figure 7 - Parallel Construction

Use	**Avoid**
The contractor PREPARES a bid and MAILS it to the agency.	The contractor prepares a bid and will mail it to the agency.
The DIRECTOR requested staff TO PREPARE several reports, COMPLETE the outline, and PLAN next week's schedule. OR, The Director requested several REPORTS, the completed OUTLINE, and next week's SCHEDULE.	The Director requested SEVERAL reports, COMPLETING the outline, and TO PLAN next week's schedule.

13. **Transitional Words.** Use transitional words to link sentences into a cohesive, logical paragraph.

Figure 8 - Transitional Words

To:	**Use:**
Add some ideas …………………	also, besides, in addition, moreover, another way, a second method.
Contrast ideas …………………..	but, yet, still, however, otherwise, nevertheless, in contrast, on the other hand.
Compare ideas ………………….	like, similar, just as.
Show result …………………….	thus, therefore, consequently, as a result, hence.
Show time ………………………	then, next, later, earlier, meantime, afterwards, immediately.

14. **Paragraphs.** Use the following rules to clarify instructions or information:

    a. **Paragraph Organization.** State the main point in the first sentence. First state the rule, then the exceptions.

    b. **Paragraph Length.** Keep paragraphs brief. Reorganize material to shorten complex paragraphs. Use subparagraphs to break up long paragraphs, or use bulleted lists.

    c. **Steps, Conditions, Limitations, and Exceptions.** Avoid complex paragraphs by listing steps in a process or procedure, conditions, limitations, and exceptions.

    d. **Numbering or Lettering Paragraphs.** Number or letter paragraphs when citing particular elements of instruction or information. If a chapter is divided into sections, at least two sections must appear within that chapter.

15. **Punctuation, Style, and Grammar.** Follow the *U.S. Government Printing Office Style Manual* in matters of punctuation, style, and grammar. Refer to the Bibliography at the end of this Handbook for a list of additional reference materials.

16. **Capitalization Rules.** Refer to the *U.S. Government Printing Office Style Manual* for general rules of capitalization. For BLM-specific rules, refer to the *WO Correspondence Supplement* (H-1541-1).

17. **Acronyms and Abbreviations.** When using an acronym or abbreviation, spell out what the acronym or abbreviation stands for the first time it occurs, and then add the acronym or abbreviation in parentheses. If acronyms or abbreviations are used in Manual Sections or Handbooks, provide a list of acronyms or abbreviations in an Appendix. See *Appendix 1, Acronyms and Abbreviations* for a listing of commonly used acronyms.

18. **Standard Citations.** Examples of standard citations are listed below:

    a. **Legal Authorities.**

        (1) Paperwork Reduction Act of 1995 (44 U.S.C. §§ 3501-3520).

        (2) Section 28 of the Mineral Leasing Act of 1920, as amended (30 U.S.C. § 185).

        (3) Federal Coal Management Program Regulations (43 CFR 3400, *et seq*.).

        (4) Alaska Livestock Grazing Act, as amended (43 U.S.C. §§ 316-3160).

        (5) Executive Order 11988, Floodplain Management (42 CFR 26951; May 25, 1977).

        (6) Departmental Manual (370 DM 713).

        (7) Secretarial Order 3048, Dam Safety, February 28, 1980.

    b. **Forms.** Use the form number and complete title the first time the form is referenced, e.g., Form 1220-1, Directives Clearance Sheet. Thereafter, use only the form title.

    c. **Reports.** Use the complete report title and report number, if any. Thereafter, use only the report title.

    d. **Units of Organization.** Use officially designated organizational names only.

19. **Assistance Information.** Do not use employee names, telephone numbers, organization codes, room numbers, or other information subject to change in Manual Sections or Handbooks. However, these references should be included in IMs and IBs.

20. **Prescribing Materials, Supplies, and Forms.** Include the following information in the directive's text, unless the listing is extensive. In that case, the following information must be provided in an appendix:

    a. **Source of supply** and availability date.

    b. **Method** of requisitioning.

    c. **Unit of issue** and stock number, if any.

21. **Footnotes and Notes.** Avoid footnotes and explanatory inserts that do not fit in with the flow of ideas in the text.

    a. Use a note following a paragraph to explain or to ensure better understanding of a word or statement. Use no more notes than necessary. Place a note in parentheses or precede it by the word **NOTE:** in all capital letters, bolded, and underlined.

       NOTE: Notes must be indented under the pertinent paragraph or subparagraphs to distinguish them from the text.

    b. Use footnotes if the explanation is so lengthy that it interrupts the thought sequence. Place the explanation in a footnote or consider reorganizing the text. Use footnotes sparingly to:

       (1) Acknowledge or give credit for borrowed or quoted material.

       (2) Explain a word or statement in the text if the explanation is too lengthy for a note.

       (3) Refer to other works or information not essential to the meaning of the text.

       (4) Identify conditions or exceptions.

    c. Identify the footnote by a superior number (a number placed slightly above the line at the end of the sentence or passage to which it relates). Place the footnote at the bottom of the page that contains the reference. Separate it from the text by a line. If the footnote is in a form, table or chart, place the footnote at the bottom of the item, not the bottom of the page.

22. **Cross-References.** Judiciously use cross-references between directives. If hyperlinks are used, they must contain both the hyperlink and a descriptive title or source information for the references within. Repeat brief items verbatim and cross-reference for lengthy technical details. Do NOT refer to temporary directives in manuals and handbooks. See Chapter II, Paragraph G2, for specific instructions on using cross-references in a Manual Section.

23. **Directive Identification.** All BLM permanent directives must have standard identifiers and each directive must be uniquely identified. See Chapter II, Paragraph B for numbering Permanent Directives. See Chapter III, Paragraph G, for numbering Temporary Directives.

D. Graphics.

Use tables, drawings, play scripts, and other graphics to replace or elaborate on text in the directive when graphic aids would convey meaning more easily than text.

1. Types of Graphics. Many different types of graphics can be used to explain and enhance the text:

   a. **Play script** is a special format for writing that is very useful to describe who does what. It is a suitable technique to explain any activity that follows a certain mandatory sequence or involves routing a piece of work through a number of individuals. Every play script must show a logical movement from one individual to another (see Illustration 1).

   b. **Drawings** may be used to convey pictorial material that is difficult to describe in text. Examples include how a fence or an embankment dam is constructed, types of signs that may be ordered from the Sign Shop, etc. Drawings may be included as Figures in the text or as Illustrations following the text.

   c. **Worksheets** may be used to guide performance for complex, repetitive, step-by step tasks. For example, a worksheet can be used to guide calculations (similar to a tax form), or to list steps in a process to be completed. Use worksheets to:

      (1) Provide an aid for use on-the-job.

      (2) Show step-by-step tasks.

      (3) Reduce the need to refer back to the directive since instructions are on the worksheet.

      (4) Provide a formal record of a completed job.

   d. **Tables** may be used to convey instructions and information. There are many different kinds of tables. Each type may be used individually, or several types may be combined to meet particular needs. Major types of tables are listed below:

      (1) **Standard Table.** Consists of data arranged in columns. The listed items are organized by some criterion such as alphabetical or numerical order. The format requirements for standard tables are not rigid; many variations are possible, depending on the kind of material portrayed in the table.

      (2) **Text Table.** Provides narrative how-to instructions in a tabular format. They may be used when there are certain common elements to particular situations that fit into a matrix.

      (3) **Flow Chart**. Typically shows steps in a process and who is responsible for completing those steps (see Illustration 2). Flowcharts may also be useful when:

         (a) Explaining a choice of actions that depends on a condition or set of conditions.

         (b) Describing such a choice would be complex or wordy.

2. **Location.** Tables, drawings, and worksheets may be included in directives as follows:
   a. **IM and IB**: Include the graphic as part of the text or as an attachment.
   b. **BLM Manual Section**: Include the graphic as a figure in the body of the text or, if more extensive, as an illustration at the end of the Manual Section.
   c. **Handbooks**: Include the graphic as a figure in the body of the text or, if more extensive, include as an illustration at the end of the Handbook.
3. **Oversized Material.** Use the following procedures when dealing with oversized material:
   a. **Reductions.** Sometimes oversized charts and tables can be reduced to fit within the margins prescribed. Use this method if legibility is not impaired. Do not reduce material without making sure reduction will not seriously impede use.
   b. **Orientation.** Try to avoid using landscape orientation as it is more difficult to view and generally requires scrolling back and forth on an on-line electronic image.
   c. **Large or Oversized Formats.** If reduction does not work effectively, use an oversized format. Avoid this technique if other workable solutions are available (e.g., multiple graphics instead of one large one) since it is more difficult to view large images on-line.

E. Templates.

All directives must be initiated in the appropriate design template (available internally on the Directives Intranet page). Originators of directives are limited to the styles and layouts available in these templates. Graphics and other non-text elements may be added (see above) to the extent that they do not interfere with the standard layout. Any deviations from this template must be approved, in advance, by the Directives Manager.

F. Accessibility.

All directives must comply fully with Section 508 of the Americans with Disabilities Act. Guidance for creating 508-compatable documents is available on the Directives Intranet page. Program offices are responsible for assuring compliance, and no directives will be processed that are not fully accessible.

CHAPTER II - FORMATTING PERMANENT DIRECTIVES

A. Structure of the Permanent Directives System.

The BLM Permanent Directives System contains three distinct, but interrelated parts: BLM Manual Sections, Handbooks, and Supplements.

1. **Manual Sections**. Manual Sections contain BLM policy, procedures, and instructions to manage individual programs. The primary audience for Manual Sections is program managers.

2. **Handbooks**. Handbooks provide detailed instructions, techniques, practices, and processes for performing specialized procedures to carry out policy and direction described in the associated BLM Manual Section. The primary audience is specialists, technicians, and clerks. Each Handbook is controlled by its Manual Section which sets out the basic authority for performing tasks and states who bears the ultimate responsibility for seeing that these tasks are accomplished. Handbooks must not contain broad objectives, policies, assignment of responsibilities, or delegations needed primarily by line officials and principal staff officials to administer programs. Handbooks are considered part of their associated BLM Manual Section and have the same force of authority as the BLM Manual Section.

   Handbooks are not always the appropriate means of conveying instructions to technicians and specialists. If this is the case, instructions for technicians and specialists may be included in the BLM Manual Section, in which case the format and structure for BLM Manual Sections must be followed by the author. When a Handbook is used, the Manual Section must, at a minimum, consist of the first seven entries in the point zero series (.01 through .07). A list of criteria for judging whether Handbooks are appropriate includes the following:

   a. Does the material consist of detailed instructions for specialists, technicians, or clerks?

   b. Will the intended audience use the Handbook on a regular basis?

   c. Is the Handbook targeted for a specific audience?

   d. Will having the material in Handbook format facilitate the understanding and use of these instructions?

   e. Is the material of sufficient page volume (generally at least 15 pages) to warrant its publication as a Handbook?

   f. Do special conditions of use (e.g., use in the Field) warrant its publication as a Handbook?

3. **Supplements**. Supplements to Manual Sections and Handbooks may be issued by the Washington Office, the Centers, or State or Field Offices to meet particular office needs. Supplements implement local programs or elaborate upon BLM Manual Sections or Handbooks. Supplements must not conflict with the BLM Manual Section or its Handbook(s).

B. Numbering Permanent Directives.

For ease of reference, all BLM permanent directives must be identified as follows:

1. **Manual Sections** must be identified with a capital "MS" preceding the Manual Section Number such as MS-2880, followed by the title of the Manual Section. For example, MS-2880, Oil and Natural Gas Pipelines.
2. **Handbooks** must be identified with a capital "H" preceding the Handbook Number and numbered sequentially, followed by the title of the Handbook. For example, H-1221-1, Writing and Formatting Directives, prepared in conjunction with MS-1221, BLM Directives.
3. **Manual Section Supplements or Handbook Supplements** must follow the same guidance as above, except that the originator's state abbreviation must follow the document identification number. For example MS-2880-UT, Oil and Natural Gas Pipelines for a Manual Section Supplement issued by Utah, to MS-2880, Oil and Natural Gas Pipelines. A Field Office Supplement must include the office code, e.g., MS-2880-NM-010, Oil and Natural Gas Pipelines.
4. **All BLM Permanent Directives** must be uniquely identified with a version (ver.) number and a version date. The initial version of a directive is ver. 1. Every time a directive is revised and reissued, the version number increases by one. For example, the third approved version of a BLM permanent directive issued on July 16, 2005, would be fully identified as ver. 3, 07/16/2005. The version number and date are placed in the footer. The version date is placed in the footer. **Any changes** to a permanent directive will require the issuance of a new version of the entire directive. This will ensure all versions are complete and current.

C. Letter Designation for Directives.

It is the responsibility of the author of the directive to assign the correct letter designation (P, I, or R for Public, Internal, or Restricted content) to indicate who may view a directive. On Permanent Directives, the letter designation follows the version number of the directive in the header of every page (see Illustration 5).

1. **Public.** Use "P" on directives that can be viewed by everyone, including the public. The "P" designation is used when the content of the directive is a policy or practice that directly affects a member of the public and all information is releasable under the FOIA (e.g., a directive on the BLM's application process for grazing allotments). Directives with a "P" designation must be posted on both the BLM Freedom of Information Act Electronic Reading Room (http://www.blm.gov/wo/st/en/res/FOIA/Reading_Room.html) and the BLM Directives Website (http://web.blm.gov/internal/wo-500/Directive_Mgt.html).
2. **Internal.** Use "I" on directives that only can be viewed by BLM staff. The "I" designation is used when (1) the content of the directive contains information requiring a review under FOIA, and/or (2) when the content is strictly an internal BLM policy or procedure that does not affect the public (e.g., a Manual Section on Time and Attendance). Directives with an "I" designation must be posted only on the BLM Directives Website.

3. **Restricted.** Use “R” on directives with access restricted to specific BLM staff. The “R” designation is used when the content of the directive is administratively sensitive and viewing is restricted to limited BLM personnel who have “a need to know” (i.e., only the person(s) the directive is addressed to, not all BLM employees and not for public release). Example of use: a directive explaining sensitive security or law enforcement procedures. Directives with an “R” designation will ***not*** be posted (linked) on either the BLM FOIA Electronic Reading Room website or the BLM Directives Website; however, they will be identified on the BLM Directives Website index (listed, but not linked).

D. BLM Manual Section Structure.

Table of Contents

List the major headings that are needed to adequately index the Manual Section for easy reference, with their corresponding page numbers. The level of detail will depend on the complexity of the Manual Section. After listing the major headings, list the Figures, Glossary of Terms, Illustrations, Appendices, Bibliography, and Handbooks by number and title (see Illustration 5).

Introductory Series: 1.1 through 1.9

Introduce the subject matter of the ENTIRE directive (BLM Manual Section and related Handbooks) with the point-zero series. The point-zero series tells what the directive contains and gives general or background information that applies to the entire directive. Do not put procedural material in the point-zero series. The first seven numbers (1.1 through 1.7) are reserved for specific subjects, so the headings must always be used as shown below. Use the remaining two numbers (1.8 and 1.9) for any additional introductory material. Look at published BLM Manual Sections for examples of the content of the point-zero series.

1.1 Purpose. State briefly what the directive contains.

1.2 Objectives. State the objectives of the program or activity covered in the directive. Describe what can be achieved by following the instructions contained in the directive.

1.3 Authority. Cite sources of authority or legal requirements for conducting the program involved. These might include the United States Code, the Code of Federal Regulations, Executive Orders, Secretarial Orders, Departmental Manuals, Federal Acquisition Regulations, etc. Review MS-1203, Delegations of Authority, for a compilation of delegations (do not cite MS-1203, IMs, or IBs as authorities at 1.3).

1.4 Responsibility. Beginning with the highest BLM officials involved, list the principal officials, by their titles, who are responsible for planning and executing the program covered in the directive. State the jurisdictional responsibilities of these officials. Also state the responsibility for all employees, if applicable.

1.5 References. List all sources of instruction and information referred to in the directive, other than those listed in the 1.3 Authority, that are ESSENTIAL to implementing the instructions contained in the directive (material that may be used optionally is contained in the Bibliography). Give a reference to the exact paragraph or subparagraph unless an entire directive or chapter must be read. Make certain that the material cited is current and readily available to the reader.

Most federally published documents are readily available to the reader and should not be included as an appendix. If the material is not readily available to the reader, include it as an appendix to the BLM Manual Section or Handbook. Do not reference draft material, temporary directives, or materials not yet published.

1.6 Policy. The policy statement is mandatory. Provide a broad, general statement that prescribes a governing principle, or a course or plan of action, designed to govern present and future actions, decisions, or procedures. The policy section may contain:

- The BLM's position or approach in handling the program.
- Broad statements about how the program will implement laws, regulations, and administrative policies.
- How the program interfaces with other programs and fits into a multiple-use management approach.

1.7 File and Records Maintenance. Describe filing procedures (arrangement and maintenance of documents), records disposition requirements, and any special requirements needed to safeguard against unauthorized disclosure of information. This heading is to be used principally as a locator to direct the reader to the section within each BLM Manual Section or Handbook dealing with files and records.

1.8 and 1.9. Use these numbers (optionally) for inserting material that does not fit under the 1.1 through 1.7 headings. This can include statements concerning BLM practices, historical data, coordination of programs, or projects with other agencies, etc.

Text: Procedural Series 1 through 9 This series of numbers, with its subsidiary coding levels, contains systems and procedural material that are important to managers. Under 1 there may be 1.1 through 1.9; under 2 there may be a 2.1 through 2.9; etc. At the lower levels of the outline, there are no limits to the number of items at any level.

In most cases, every paragraph and item in a list in the BLM Manual Section must be identified by a number or letter. Do not use dots or dashes for major paragraphs because these cannot be easily cited. Make all components as numerically consistent as possible between the Code of Federal Regulations and the BLM Manual Section.

Additional Materials Following the procedural series are materials that contribute to the understanding of the preceding text. This material includes the following:

Glossary of Terms (definitions needed to understand the material).

Illustrations (forms, drawings, formats, tables, etc., if not used as figures in the text).

Bibliography (reading material that is not necessary to implementing the Manual Section itself, but provides background information for the reader).

Appendices (legal opinions, lists, copies of laws, documents from other agencies, and other material not readily available in the reader's office).

Numbers and Titles Manual Section numbers and titles are tied to the Subject Codes (see MS-1220, Records and Information Management, Appendix 1).

E. Handbook Structure

Table of Contents Begin each Handbook with a Table of Contents. The Table of Contents must show at least all the major internal headings (to the first level) and their corresponding page numbers for each chapter. Provide enough detail so the reader can easily navigate through the document.

Background or Foreword Paragraphs If desired, background or foreword paragraphs may be used preceding the body of the text. As a general rule, these paragraphs should be brief. Avoid an elaborate history or justification of the program.

Text

The remaining Handbook format is flexible. However, formats must be discussed with the Division of IRM Governance or the appropriate Directives office. A traditional outline format (beginning with either a Roman numeral or capital letter) is preferred since it is commonly used and readily recognized by employees.

Illustrative Materials

Figures (inserted in the text).

Use figures to insert illustrations, examples, charts, and tables into the text of Handbooks near related text material.

- Keep figures short; one page or less. Do not divide figures between two pages. Longer figures disrupt the flow of the text and should be placed at the end of the Handbook as illustrations.
- Frame figures with a solid black line to provide clear separation between the figure and the text.
- Number figures consecutively using Arabic numerals preceded by the word Figure, and give all figures a descriptive heading (e.g., Figure 1 - Numbers of Archaeological Sites). If desired, incorporate the chapter of the Handbook in the figure number (e.g., the first figure of Chapter III might read: Figure III-1 - Numbers of Archaeological Sites).
- Place the figure number and title above or below the figure and center it.
- Ensure that all figures have appropriate alternate text to ensure compliance with Section 508.

Place any other illustrative materials that contribute to the understanding of the text at the end of the Handbook.

Glossary of Terms (definitions needed to understand the material).

Illustrations (forms, drawings, formats, tables, etc., if not used as figures in the text).

Bibliography (reading material that is not necessary to implementing the Manual Section itself, but that provides background information).

Appendices (legal opinions, lists, copies of laws, documents from other agencies, and other material not readily available).

Number of Handbooks

There are no limits on the number of Handbooks per Manual Section. Offices should use discretion in balancing the length and number of Handbooks.

Cover Every Handbook must have a cover that clearly labels its contents as a BLM Handbook. Artwork may be used on Handbook covers. The cover should include the Handbook number and title (see next entry) and the version number. DO NOT include a date on the Handbook cover.

Numbers and Titles Handbooks have the same number as the BLM Manual Section to which they are appended. An “H” precedes the Handbook number. Since BLM Manual Sections may have more than one Handbook, the Handbooks that are part of a particular BLM Manual Section are also numbered consecutively; for example H-9670-l, H-9670-2, H-9670-3, etc. If a Handbook crosses functional lines, assign the Handbook to the most pertinent BLM Manual Section. List the Handbook in the Table of Contents in any other pertinent BLM Manual Sections; Handbooks are listed at the end of the Table of Contents.

F. Supplement Structure.

General Supplements may be prepared for existing Manual Sections or Handbooks. Each supplement must be numbered as a supplement (e.g., H-1221-1-CA for a Handbook Supplement specifically applicable to California or MS-1221-UT for a Manual Section Supplement for Utah). Supplements must be limited to additional information not found in the original directive.

Table of Contents The Supplement must mirror the Table of Contents of the existing Manual Section or Handbook. It may not change the existing titles and location of material in the Table of Contents other than to add titles at the end of particular sections. If a title is not used in the text of the Supplement, the words (“See Manual Section” or “See Handbook”) are added immediately following the title in the Table of Contents.

Text The Manual Section’s headings must be mirrored in the Manual Section Supplement listed by number and title. If material is not supplemented, the words (“See Manual Section” or “See Handbook”) are inserted immediately following the title. If the text is supplemented, that material is inserted after the title. Supplements are limited to additional information not found in the original directive.

Additional Materials

Glossary of Terms. A Glossary of Terms may be included in the Supplement. Add terms that are not included in the Manual Section or Handbook.

Illustrations. Illustrations may be included in the Supplement. These must be numbered sequentially starting with the next number following the last illustration in the Manual Section or Handbook.

Bibliography. A Bibliography may be included in the Supplement. Add listings in the Bibliography that are not included in the Manual Section or Handbook.

Appendices. Appendices must be numbered sequentially starting with the next number following the last appendix in the Manual Section or Handbook.

Section Headings

The Supplement has the same number and title as the Manual Section or Handbook that it is supplementing.

Page Numbering

The Supplement has the same page numbering system as the Manual Section or Handbook that it is supplementing.

Supplement Version Numbers

Supplements are assigned version numbers consistent with Chapter II, Paragraph B.

Writing a Supplement in the Absence of a Valid or Current Manual Section or Handbook

Offices should consult with the responsible Headquarters office and the Division of IRM Governance prior to writing a Supplement when a Manual Section or Handbook does not exist or when the Manual Section or Handbook is outdated.

G. Format Standards Pertinent to BLM Manual Sections and Handbooks.

1. **Headings.**

   a. **When to Use Headings.** Use headings if a paragraph in the BLM Manual Section is tied to a part, section, or paragraph in the Code of Federal Regulations, or is of sufficient importance that the subject is located at the first digit after the decimal point in the subject code. If desired, headings may be used at lower outline levels. Use headings in the BLM Manual Section and Handbook to highlight any important material.

   b. **Types of Headings.**
   Use either static or running headings. For static headings, each heading is followed by a period and then a sentence with its own period at the end. For running headings, the first words of the sentence are the heading. They are underlined and capitalized, but not followed by a period. The period appears only at the end of the sentence. Within any particular paragraph (A, B, C; or 1, 2, 3; etc.), the headings should be either consistently static or consistently running. These instructions may be used as guidelines for Handbooks.

2. **Cross-References.**

Cross-references to lengthy material are encouraged. Cross-referencing may be incorporated as part of the paragraph title by putting the cross-reference citation in parentheses, or it can be incorporated as part of the text of the paragraph. In either case, hyperlinks may be used in electronic documents. When using cross-references, remember that when the cross-referenced material is changed, the paragraph references to that material may also need to be changed.

a. **Cross-References to BLM Manual Sections.** For the sake of brevity, avoid repeating one part of the BLM Manual Section in another part. Sometimes it may be best to briefly paraphrase information from another BLM Manual Section. Usually the best method is to cite the BLM Manual Section. Cite BLM Manual Sections and Handbooks as shown in Figure 9.

b. **Cross-References within a Manual Section or Handbook.** Mention every form or other type of illustration included in a BLM Manual Section or Handbook in the text of that BLM Manual Section or Handbook. The illustration itself must also carry a cross-reference to the text. The cross-reference is the paragraph number of the paragraph in the text where the illustration is mentioned. Place the corresponding page number and cross-reference to the paragraph number in parentheses directly below the Illustration title. Cite cross-references within BLM Manual Sections and Handbooks as shown in Figure 9.

Figure 9 – How to Cross-Reference BLM Manual Sections and Handbooks

Cross Reference	BLM Manual Section	Handbook
Cross Reference to BLM Manual Section or Handbook.	See MS-XXXX, BLM Manual Title.	See H-XXXX-Y, Handbook Title.
Cross Reference to BLM Manual Chapter or Handbook.	See MS-XXXX, Chapter Z, BLM Manual Title.	See H-XXXX-Y, Chapter Z, Handbook Title.
Cross Reference to BLM BLM Manual Chapter Section or Handbook.	See MS-XXXX, Chapter Z.Z, BLM Manual Title.	See H-XXXX-Y, Chapter Z.Z, Handbook Title.

c. **Cross-References to IMs and IBs**. **NEVER** cite temporary directives (IMs or IBs) in a BLM Manual Section or Handbook, both of which are permanent directives. Do not present temporary directives in illustrations or appendices.

d. **Cross-References to Other Publications.** It may be helpful to refer readers to instructions in other publications. However, do this only if readers will have access to these publications. Include these references in the BLM Manual Section 1.5, References, if these references are necessary for employees to understand or implement instructions in the BLM Manual Section or Handbook. Include publications in the Bibliography if the material is not necessary, but optional.

H. Formatting the Final Copy.

Template	All directives must use the approved BLM template, which standardizes fonts and styles.
Typeface or Font	All text should be in the BLM standard font (Times New Roman, size 12). Use standard BLM word processing software.
Dual-Column Format	Dual column format is not authorized; only single-column format is allowed.
Entering Headings	Center the BLM Manual Section or Handbook number and title in capital letters at the top of each page of a BLM Manual Section or Handbook. See the heading on this page for an example of the headings on permanent directives. Provide titles under the headings for the Table of Contents, Glossary of Terms, Illustrations, Appendices, and Bibliography.
Table of Contents	Organize the Table of Contents using automatic indexing capabilities of the word processing software. The Table of Contents reflects all major paragraphs in the Manual Section or Handbook, as determined by the writer.
Text	Use word processing software to enter the text. Do not split a block of numbers or a figure that occupies a page or less. Place it either on the same page as the related text or on the page immediately following. Ensure that no pages contain "widows" or "orphans." A widow is defined as a paragraph-ending line (or heading) that falls at the beginning of the following page/column, thus separated from the remainder of the text. An orphan is defined as a paragraph-opening line (or heading) that appears by itself at the bottom of a page/column.
Glossary of Terms	See Illustration 6 for an example of a Glossary of Terms.
Illustrations	Include illustrations in the directive when appropriate.
Bibliography	See Illustration 7 for an example of a Bibliography.
Version Number and Date Signed	The office responsible for directives adds this information to each page of the BLM Manual Section or Handbook when the BLM Manual Section or Handbook is prepared for distribution.
Page Marking	Clearly annotate draft documents on each page with "Draft" centered at the bottom of the page.

Downloaded or Printed Documents	Permanent directives must be marked "Check the BLM Directives Website to verify that this is the current version before use."
Page Number Location	Number all pages consecutively in the top right of each page, beginning with the chapter number, a dash, and Arabic Numeral 1, on the first page following the cover if applicable. This consecutive numbering applies to all parts of the document, including the Table of Contents through to the Glossary, Illustrations, and Bibliography.

I. Preparing the Permanent Directive for Surname and Signature.

1. **Transmittal Sheet.** Each BLM Manual Section and Handbook must have a separate Form 1221-2, Transmittal Sheet.

   a. When the proposed directive is ready for review, the originating office must prepare a Transmittal Sheet and send it, along with the BLM Manual Section or Handbook, to the Division of IRM Governance or appropriate Directives office.

   b. Illustration 8 provides additional instructions for completing the Transmittal Sheet. This sheet must carry the signature of the signing official and the directions to follow to administer the review process.

   c. The Transmittal Sheet for Manual Section Supplements is identified as a Headquarters or Field Office Supplement on the heading in the space between "Bureau of Land Management" and "Transmittal Sheet" (see Illustration 8). Transmittal Sheets are signed according to the Signing Authority Chart (see MS-l221, Chapter 3.2, BLM Directives Manual).

   d. Specifically identify what the changes are if the version is less than a total rewrite.

2. **Directives Clearance Sheet**. The originating office must prepare form 1220-1, the Directives Clearance Sheet, and affix it to the draft Manual Section or Handbook packet.

J. Surnaming and Signing.

1. The originating office must route the permanent directive packet to the appropriate surnaming and signing officials.

2. See MS-1221, Chapter 3 for surnaming and signing standards.

3. The appropriate surnaming and signing officials review the proposed directive, provide any comments, and surname the Directives Clearance Sheet indicating concurrence or non-concurrence. In the case of concurrent review, return the Directives Clearance Sheet with any comments to the originating office. For sequential reviews, forward the surnamed Directives Clearance Sheet with the directive packet to the next designated reviewer. In urgent or emergency situations, the appropriate surnaming officials may email the originating office indicating concurrence or non-concurrence with the directive and their intent to forward the surnamed Directives Clearance Sheet.

4. Originating offices must collect and retain the surnamed version(s) of the Directives Clearance Sheet(s) and any other associated documentation that indicates the comments

and recommendations made with regard to the proposed directive. They will resolve comments and then prepare the approved Manual Section, Handbook, or Supplement as required. The original Directives Clearance Sheet(s), Transmittal Sheet, Manual Section, Handbook, or Supplement, and any other associated documentation should then be placed in the package before forwarding to signing official for signature. The signing official signs the Transmittal Sheet and surnames the Directives Clearance Sheet.

5. The signing official's office then forwards the original directive, Transmittal Sheet, and Directives Clearance Sheet to the Directives office so they may add the date and assign the version number. The signing official's office must forward the paper file copy of the directive and all supporting documentation (surnaming package) created indicating the position taken with respect to the proposed directive to the Directives office to be included in the Directives Case File.

6. The Originating office must supply an electronic version of the final (signed) directive to the Directives office so that they may authenticate and validate the directive before posting.

K. Distribution.

The Division of IRM Governance or appropriate Directives Office:

1. Updates the electronic version of the directive with the signed date and version number.

2. Scans the signed Transmittal Sheet into a .pdf file.

3. Posts the Manual Section, Handbook, or Supplement with the scanned Transmittal Sheet to the BLM Directives Website. If the Manual Section, Handbook or Supplement affects the public, Directives posts the directive to the FOIA Electronic Reading Room.

4. Prepares an email to all BLM employees announcing the Manual Section, Handbook, or Supplement and specifying the web link where the file containing the approved directive is located.

5. Maintains the official record copies.

CHAPTER III - FORMATTING TEMPORARY DIRECTIVES

A. Letterhead.

Temporary Directives must utilize the letterhead format for the office of the signing official. (See Illustration 3.)

B. Subject Codes and Office Codes.

It is the responsibility of the author of the directive to assign the proper subject code.

1. Place the subject code(s) and originating office code(s) in the upper left corner of the IM or IB directly beneath the phrase "In Reply Refer To:"
2. Assign all subject codes that apply to the subject of the IM or IB. In many cases, multiple subject codes are needed, but the office code of the originating office(s) should be used.
3. Do not use subject codes with extra numbers or letters that are not in use across the BLM.

C. Letter Designation for Viewing Directives.

It is the responsibility of the author of the directive to assign the correct letter designation for viewing directives. On Temporary Directives (IMs and IBs), the letter designation (P, I, or R) must follow the subject code and office code as shown in Figure 10.

1. 1. **Public.** Use "P" on directives that can be viewed by everyone, including the public. The "P" designation is used when the content of the directive is a policy or practice that directly affects a member of the public and all information is releasable under the FOIA (e.g., a directive on the BLM's application process for grazing allotments). Directives with a "P" designation must be posted on both the BLM Freedom of Information Act Electronic Reading Room webpage and the BLM Directives Website.
2. **Internal.** Use "I" on directives that only can be viewed by BLM staff. The "I" designation is used when (1) the content of the directive contains information requiring a review under FOIA, and/or (2) when the content is strictly an internal BLM policy or procedure that does not affect the public (e.g., a Manual Section on Time and Attendance). Directives with an "I" designation must be posted only on the BLM Directives Website.
3. **Restricted.** Use "R" on directives with access restricted to specific BLM staff. The "R" designation is used when the content of the directive is administratively sensitive and viewing is restricted to limited BLM personnel who have "a need to know" (i.e., only the person(s) the directive is addressed to, not all BLM employees and not for public release). Example of use: a directive explaining sensitive security or law enforcement procedures. Directives with an "R" designation will ***not*** be posted (linked) on either the BLM FOIA Electronic Reading Room website or the BLM Directives Website; however, they will be identified on the BLM Directives Website index (listed, but not linked).

Figure 10 – Notations

In Reply Refer To: 4100 (200) P	In Reply Refer To: 1400-210 (700) I	In Reply Refer To: 9310 (120) R

D. Date Signed.

The date of signature is the effective date of the IM or IB unless stated otherwise in the directive. The signature date is placed on the original and all copies after the IM or IB is signed.

E. EMS Notification Line.

The Directives Analyst (IRM Governance) will enter the date the directive is distributed via email. This date may or may not be the same as the effective date; for example an IM signed on 12/26/2005 and issued the same day would have the same notification and effective date.

F. Types of Temporary Directives.

There are two types of Temporary Directives: IMs and IBs. See MS-1221, Chapter 1.2 for further details.

G. Numbering Temporary Directives.

Both IMs and IBs are numbered using separate numbering systems for tracking composed of the office abbreviation for the issuing office, followed by type of temporary directive, fiscal year of issuance, and sequential number. For offices below State Office level, include the office code (e.g., WO IM 2005-022; CO IB 2005-001, NM-10000 IM 2005-050). The number is assigned by the Directives office (or appropriate administrative office at the Field Office level) only after the IM or IB is signed.

H. Administrative Corrections.

Administrative corrections (correcting typos or omissions) that do not affect the intent of the directive may be made and the directive reposted without issuing a new directive. For example, corrections to subject codes, form numbers, due dates, etc. Notification must be made through the directives distribution process. Administrative corrections generally will be allowed within 2 business days of submission of the Temporary Directive to IRM Governance.

I. Changes to Temporary Directives.

Changes in content to a previously issued Temporary Directive must be issued as a new temporary directive. The new Temporary Directive must identify the prior Temporary Directive that it cancels.

J. Expiration of Temporary Directives.

All IMs remain in effect until the end of the second fiscal year after they are created, unless they have an earlier self-cancelling date. These IMs may be renewed for an additional 1 year; and they may be renewed a second time (also for 1 year) at the discretion of the Directives Manager, with adequate justification. Information Bulletins are usually self-expiring and are kept only as long as they are needed. Information Bulletins expire no later than 1 year after issuance. For example, if an IB requests only comments on a draft directive, the IB would expire on the due date. (See Chapter IV for disposition instructions.)

K. "To" Line.

All IMs and IBs are sent to titles of officials or offices, not to names of individuals. The authoring program office is responsible for making certain that all officials needing to see the IM or IB and officials mentioned in the IM or IB are on the **To** line. The following table identifies receiving officials and their abbreviations:

Figure 11 – "To" Line

RECEIVING OFFICIALS	ABBREVIATION
1. Directorate a. Director and Special Assistants b. Deputy Director c. Assistant Directors d. Deputy Assistant Directors	1. (None) a. Must be spelled out b. DD c. ADs d. DADs
2. All Washington Office Officials a. Director and Special Assistants b. Deputy Director c. Assistant Directors d. Deputy Assistant Directors e. Division Chiefs f. Deputy Division Chiefs	2. All WO Officials
3. All Field Officials a. State Directors b. Field Managers c. District Managers d. Resource Area Managers e. Center Directors	3. All FOs
4. State Directors	4. SDs
5. Center Directors a. National Interagency Fire Center b. National Training Center c. National Operations Center	5. CDs a. CD-NIFC b. CD-NTC c. CD-NOC

Titles of receiving officials may be combined on the **To** line. For example, the **To** line may read **All WO and Field Officials**, or it may read **Directorate, SDs, and CD-NOC**. The **To** line may also be written to show exceptions such as **All State Directors (except Montana)**. Directives may be issued to a single office.

L. Attention Line. (Optional)

An **Attention** line may be included just below the **To** line, indented and abbreviated as "Attn:" on the line below. This procedure is helpful in those cases where IMs or IBs should be brought promptly to the attention of particular officials or groups (e.g., Human Resources Officers, Planning Chiefs, Deputy State Directors, etc.).

M. From Line.

The **From** line is the signing official's title.

N. Subject Line.

Be as specific as possible about the subject content of the IM or IB. As a general rule, limit the subject line to two lines. Include key words within the subject line to enable indexing of IMs and IBs.

O. Due Date.

Use the Due Date (DD) to alert officials of the need to submit material to a specific office by a designated time. Due dates may be used on IBs for minor actions, such as submitting names for training, etc. Follow these rules:

1. Put the DD on the subject line near the right margin if there must be a response to the IM or IB by a certain date. It may be bolded to emphasize the deadline.
2. Make certain that the DD does not fall on a weekend or holiday.
3. Allow a reasonable time to respond to a request for information.

P. Instruction Memorandum Format.

The body of an IM must contain the following sections (see Illustration 3):

1. Program Area. Cite or reference the affected program(s).
2. Purpose. Provide a brief statement of the intent of the directive.
3. Policy/Action. Describe the policy established by the IM or the action required of the recipient.
4. Timeframe. Include the effective date of the policy and any associated actions.
5. Budget Impact. Indicate costs to implement policies/actions, or cost savings.
6. Background. Briefly describe the conditions or situation that prompted the IM.
7. Directives Affected. List the Manual Sections, Handbooks, Supplements, or IMs impacted by the issuance of the directive. For IMs, this could also indicate which prior IM is canceled through the issuance of the directive, if appropriate.
8. Coordination. Show which offices and/or agencies were involved in developing this IM.
9. Contact. Include the name, title, and office telephone number of the individual(s) best prepared to answer questions or respond to concerns.

Q. Information Bulletin Format.

The body of the IB is written in standard paragraph form. (See Illustration 4.)

R. Quality Checking an Instruction Memorandum or Information Bulletin.

1. Thoroughly check these items before sending the IM or IB for surnaming:
   a. Grammar.
   b. Punctuation.
   c. Spelling and typing errors.
   d. Clarity.
   e. Correct and complete legal or reference citations.
2. Do not reference policy contained in a canceled IM.
3. Clearly annotate draft documents with “Draft” on each page.

S. Signature Line.

1. Be certain the signing official is authorized to sign the IM or IB. See MS-1221.2, Delegation of Authority for Surnaming and Signing.
2. Ensure there is room for the signature. Allow eight blank lines for the signature between the last line of the IM or IB and the attachment line.
3. The signing official must sign an original version of the directive and forward the signed version to the Division of IRM Governance or appropriate directives office. Signatures should be in blue ink. The signing official’s name is typed below the signature. If the official is acting, “Acting” must be typed below the official’s name. Acting officials sign as “Acting,” not as “Acting for.”

T. Attachments.

1. All attachments must be in an electronic format.
2. If the attachment is a draft document, mark each page “**Draft**” in the header or footer, or as a watermark on the page.
3. For the Attachment listing on the last page of the directive:
   a. List the number of attachments.
   b. Enter the EXACT titles of the attachments.
   c. Give the number of pages each attachment has in parentheses at the end of the attachment title. For example:

Figure 12 - Attachment Listing

2 Attachments: 1 - FY 2004 Budget Report (12 pp) 2 - Project List (1 p)

4. Attachments must be identified and attachment pages numbered.

   a. For attachment materials previously numbered (e.g., booklets, large-volume materials), the attachment number must be placed on the cover page or the first page of the document with the total number of pages of the attachment specified. Existing attachment pagination may be used.

   b. For attachment materials previously not numbered, each page must be annotated with the attachment page number.

   c. For attachment materials in modifiable electronic format, each page must be identified with the number of the attachment readily visible on every page. Page numbers must be numbered consecutively for each attachment, beginning with page 1. For example, Attachment 1-1, Attachment 1-2, etc.

   d. For one page attachments, only the Attachment number is needed. For example, Attachment 2.

5. Directives may announce the availability or distribution of material which cannot be attached in an electronic format, e.g., videos, documents generated from outside sources, etc. These materials will not be identified as attachments to the directive. The material will be distributed separately and will not be disseminated through the Directives System.

U. Preparing the Temporary Directive for Surname and Signature.

The originating office must attach the Directives Clearance Sheet to the draft IM or IB, with all attachments, and any supporting documentation.

V. Surnaming and Signing.

1. The originating office must route the temporary directive packet to the appropriate surnaming and signing officials.

2. See MS-1221, Chapter 3 for surnaming and signing standards.

3. The appropriate surnaming and signing officials review the proposed directive, provide any comments, and surname the Directives Clearance Sheet indicating concurrence or non-concurrence. In the case of concurrent review, return the Directives Clearance Sheet with any comments to the originating office. For sequential reviews, forward the surnamed Directives Clearance Sheet with the directive packet to the next designated reviewer. In urgent or emergency situations, the appropriate surnaming officials may email the originating office indicating concurrence or non-concurrence with the directive and their intent to forward the surnamed Directives Clearance Sheet.

4. Originating offices must:
   a. Collect and retain the surnamed version(s) of the Directives Clearance Sheet(s) and any other associated documentation indicating the comments and recommendations made with regard to the proposed directive and resolve comments.
   b. Prepare the approved IM or IB, with attachments.
   c. Forward the original Directives Clearance Sheet(s), directive, and attachments to the signing official for signature.
5. The signing official signs the directive and surnames the Directives Clearance Sheet.
6. After signature, the directive is dated, and the name of the signing official is typed below the signature. "Acting" is added, if appropriate, below the typed name.
7. The original directive, attachments and Directives Clearance Sheet are forwarded to the Directives office for numbering.
8. The originating office forwards the electronic version of the final (signed) directive to the Directives office.
9. The file copy of the directive and all supporting documentation created indicating the position taken with respect to the proposed directive (e.g., an e-mail indicating concurrence or non-concurrence with the directive, including drafts and comments) are forwarded to the Directives office to be included in the Directives Historical Case File.

W. Distribution.

1. The Division of IRM Governance or appropriate Directives office will:
   a. Number the original directive and any associated copies.
   b. Annotate the electronic version of the directive with the date and authenticate the signature, and "Acting," if appropriate, of the signing official. The name and office of the individual authenticating the signature, and the EMS notification date must also be placed on the electronic version of the directive. (See Illustrations 3 and 4.)
   c. Post the IM or IB on the BLM Directives Website where approved and effective documents are presented. "Restricted" directives must not be posted on the BLM Directives Website, but will appear on the index without a link to the directive. A separate distribution (e.g., email, hardcopy, etc.) will be made to only those employees with a "need-to-know."
   d. Prepare an email to all BLM officials designated to receive the directive by the authoring program office. For a list of approved titles and addresses refer to figure 11. The email will include a web link to the approved IM or IB.
   e. Maintain the official record copies.

CHAPTER IV – REVALIDATING AND MAINTAINING DIRECTIVES

A. Directives Update.

Directive updates must occur as often as required to ensure BLM policy, direction, and information remain current. (See Chapter II and III for procedures.)

B. Review and Revalidation.

All BLM Manual Sections, Handbooks, and IMs must be periodically revalidated to ensure the directives are current. Revalidation of a directive involves a review for currency and appropriateness. This can result in (1) updating of the directive if required, (2) certification that the directive is current, or (3) cancellation of the directive. **At a minimum, revalidations are performed within 2 years of the most recent version or certification of the Manual Section.**

1. During the beginning of the first quarter of the FY, the Division of IRM Governance or local Directives office will generate a list of directives that require revalidation. The appropriate Directive's Office will send an IM or IB to appropriate officials to review their directives posted on the BLM Directives Website. (IMs generated after the issuance of the revalidation IM or IB will be considered for revalidation during the next cycle.)
2. The originating office must review their directives. The decision to revise, cancel, or continue the BLM Manual Section, Handbook, or IM is based on criteria listed on Form 1221-3, Directive Review and Certification. (See Illustration 9.)
3. The following guidelines must be followed:
   a. Manual Sections and their associated Handbooks must be revalidated concurrently.
   b. IMs must be revalidated when Manual Sections and Handbooks are revalidated.
   c. Information Bulletins are not revalidated because they expire as soon as they are no longer needed, or no later than 1 year after issuance.
4. The originating office must determine the action to take based on the following:

If the Directive is a:	**Is The Directive Current?**	**Action ***
Manual Section	Yes	Certify Manual Section
	No (no longer needed)	Cancel Manual Section
	No (requires update)	Revise Manual Section using established procedures outlined in this Handbook
Handbook without a Manual Section Revision	Yes	Certify Handbook
	No (no longer needed)	Cancel Handbook
	No (requires update)	Revise Handbook using established procedures outlined in this Handbook
If the Directive is a:	**Is The Directive Current?**	**Action ***

Handbook with a Manual Section Revision	Yes (Manual Section Revision does not affect Handbook)	Certify Handbook
	No (Handbook no longer needed)	Cancel Handbook
	No (Manual Section Revision does affect Handbook or Handbook requires update)	Revise Handbook using established procedures outlined in this Handbook
Manual Section/Handbook with IM(s)	Yes	Cancel IM(s)
	No	Update Manual Section/Handbook; incorporate IM(s) into new version and then cancel IM(s)
IM(s) Only without a corresponding Manual Section/Handbook	Yes	Create Manual Section/Handbook as applicable
	No	Cancel IM(s)

*Each process requires the submission of a Directive Review and Certification Form to the appropriate Directives office.

> **<u>NOTE</u>:** Manual Section/Handbook Supplements follow the same process as outlined above, except that revisions should be postponed until the WO revisions are issued or the WO office has been consulted.

5. The originating office must complete the Directive Review and Certification Form.
6. The originating office must submit the Directive Review and Certification Form to the official with the same delegation of authority as the original directive for signature.
7. Forward the signed, completed Directive Review and Certification Form to the appropriate Directives office.

C. Cancellation.

If a BLM Manual Section, Handbook, or IM is canceled, the originating offices must document the cancellation on the Directive Review and Certification Form. The originating office completes Form 1221-2, Transmittal Sheet (see Chapter II, Paragraph I) explaining the reason for canceling a Manual Section or Handbook; the form is then signed by the approving official. The Transmittal Sheet refers the reader to other pertinent policies and procedures on the subject, as appropriate, and provides direction regarding removal of the BLM Manual Section or Handbook from the BLM Directives System, the BLM FOIA Electronic Reading Room and the BLM Directives Websites.

D. Revision.

If a BLM Manual Section or Handbook needs revision, the originating office must issue a revised BLM Manual Section or Handbook and corresponding Transmittal Sheet by the end of March of the current FY. For revisions that cannot be completed within this 6-month period, a justification with an estimated completion date must be provided to the BLM Director.

E. Directives Website Maintenance.

The Division of IRM Governance, or the appropriate Field Office Directives Office, will maintain the BLM Directives Website as follows:

1. All current directives are posted to the Active Section of the BLM Directives Website, where only the latest approved and effective versions of directives are maintained and available.
2. Canceled or superseded directives will be moved to the Historical Section of the BLM Directives Website.
3. The BLM Directives Website will contain an index, including the directive number, version number, signature date, originating office code, subject code, and subject. All other local Directives Websites must mirror the BLM Directives Website established by the Washington Office. For technical specifications concerning the BLM Directives Website, contact the webmaster identified on the website.

F. Filing.

The official record copy of directives is maintained in a hard copy format with an original signature. Directives that contain an access category of "Restricted" (R) must be maintained in a secure location, i.e., a locked cabinet or room.

1. Directives Master Files.

   The Directives Office maintains the master file for each directive issued by their respective office. They are arranged by directive type: i.e., Manual Sections, Handbooks, Supplements, IMs, and IBs. Permanent Directives are filed in subject code order. Each Permanent Directive issued will have its own file folder containing the original signed hard copy directive, Transmittal Sheet, and Directives Clearance Sheet. Each IM and IB is filed by FY and numerical order, and contains the original signed hard copy directive, attachments, and Directives Clearance Sheet.

2. Directives Case Files.

   The Directives Office maintains the case file for each directive issued by their respective office. They are arranged by directive type, i.e., Manual Sections, Handbooks, Supplements, IMs, and IBs. Permanent Directives are filed in subject code order. Each Permanent Directive issued will have its own file folder containing a copy of the directive, Transmittal Sheet, Directives Clearance Sheet, and any background material, including significant draft documents and comments. The IMs and IBs are filed by FY and numerical order and contain a copy of the directive, attachments, Directives Clearance Sheet, and any background material, including significant draft documents and comments.

3. Directive Review and Certification Forms.

   The Directive Review and Certification Form is filed in the Directives Revalidation Project Folder under subject code 1221 and maintained in Central Files.

4. Reference Copies.

   Because directives can be easily retrieved from BLM's Directives Website, reference binders do not need to be maintained. Reference copies of directives may be maintained solely for convenience.

G. Disposition.

1. Directives Master Files.

   a. Manual Sections, Handbooks, Supplements, and IMs are permanent records and are maintained in accordance with the General Records Schedule (GRS) 16/1a(1).

   b. Information Bulletins are used to disseminate information of interest to BLM employees and do not contain long-term policy; therefore, they are considered temporary and are disposed of in accordance with GRS 16/1a(2) (proposed disposition).

2. Directives Case Files.

   a. Administrative Directives Case Files documenting aspects of BLM administrative program directives relating to routine administrative functions (e.g., payroll, procurement, personnel, property, vehicles, budget, forms, etc.) are disposed of in accordance with GRS 16/1b(1).

   b. Mission-Related Directives Case Files documenting aspects of the development of a BLM mission-related program directive (e.g., lands, minerals, range, forestry, wildlife, soil, water, air, recreation, etc.) are permanent records maintained in accordance with GRS 16/1b(2).

3. Directive Review and Certification Forms.

   The Directive Review and Certification Form is disposed of in accordance with GRS 16/1d (proposed disposition). Since it documents only the last revalidation period, it is a temporary record that is retained for 3 years only.

4. Reference Copies.

   Reference copies of directives are considered non-record working files and can be disposed of when no longer need for convenience or reference purposes under GRS 23/21.

Illustration 1 – Example of a Play Script

(See Page 9, Chapter I, Paragraph D1a.)

Steps in the Manual Section Writing Process

Responsible Official	Step	Action
Originating Official	1.	Determine the scope of the Manual Section
	2.	Consult with the responsible Division of IRM Governance Directives Coordinator for guidance on beginning the directive writing process. Additional consultation should take place, as necessary, throughout the writing process.
	3.	Review relevant material including laws, regulations, orders, and other existing directives.
		3a. If the directive is critical, include the work schedule after confirming the schedule with Division of IRM Governance.
	4.	Outline the material.
		4a. If Handbooks are to be used, segregate material needed for managers in the Manual Section and what is needed for specialists and technicians in the Handbook.
	5.	Determine what graphics are appropriate.
	6.	Clear the assignment of subject code numbers with Division of IRM Governance Coordinator.
	7.	Write the draft Manual Section or Handbook.
	8.	Send the draft for review, comment and surname to concerned officials.
	9.	Incorporate appropriate comments into the final Manual Section or Handbook.
	10.	Send the final Manual Section or Handbook for editing.
Division of IRM Governance	11.	Review the final directive for organization, format, typing and grammar errors, and other points of review as listed on the Directives Processing Checklist.
Originating Official	12.	Arrange for retyping, if needed.
	13.	Route the final Manual Section or Handbook to the signing official.
Signing Official	14.	Review the Manual Section or Handbook and sign the Transmittal Sheet.
Division of IRM Governance	15.	Prepare the Manual Section Release for distribution and posting.

INSTRUCTIONS

1. Paragraph Number. If the play script is included as part of the text, the play script is assigned a paragraph number and a brief introductory statement may be added, as with any other Manual Section or Handbook paragraph.

2. Appendix. If the play script is added as an appendix, it is titled and an introduction may be included, if needed.

3. “Responsible Official” Column. This column lists the officials responsible for carrying out the consecutive actions that constitute the work process. Include only BLM officials.

4. “Step” Column. This column records the actions in numerals from 1 to the end of the work process. Exceptions to the “normal” action are numbered as follows: 1a, 1b, 1c, etc.

5. “Action” Column. This column includes all actions in time sequence as they occur in the process. Each action step leads directly to the next one, so there is not a break or repetition in the flow of action.

   Exceptions to the “normal” action are sub-steps, and begin with the word “if” (e.g., “If the review cannot be completed within 30 days, notify the originator as to the approximate date of completion.”).

6. Language. Each action begins with an action verb and is stated in a short, positive sentence.

Illustration 2 - Example of a Flow Chart

(See Chapter I, Paragraph D1d)

FLOW CHART FOR DETERMINING DIRECTIVE CATEGORY

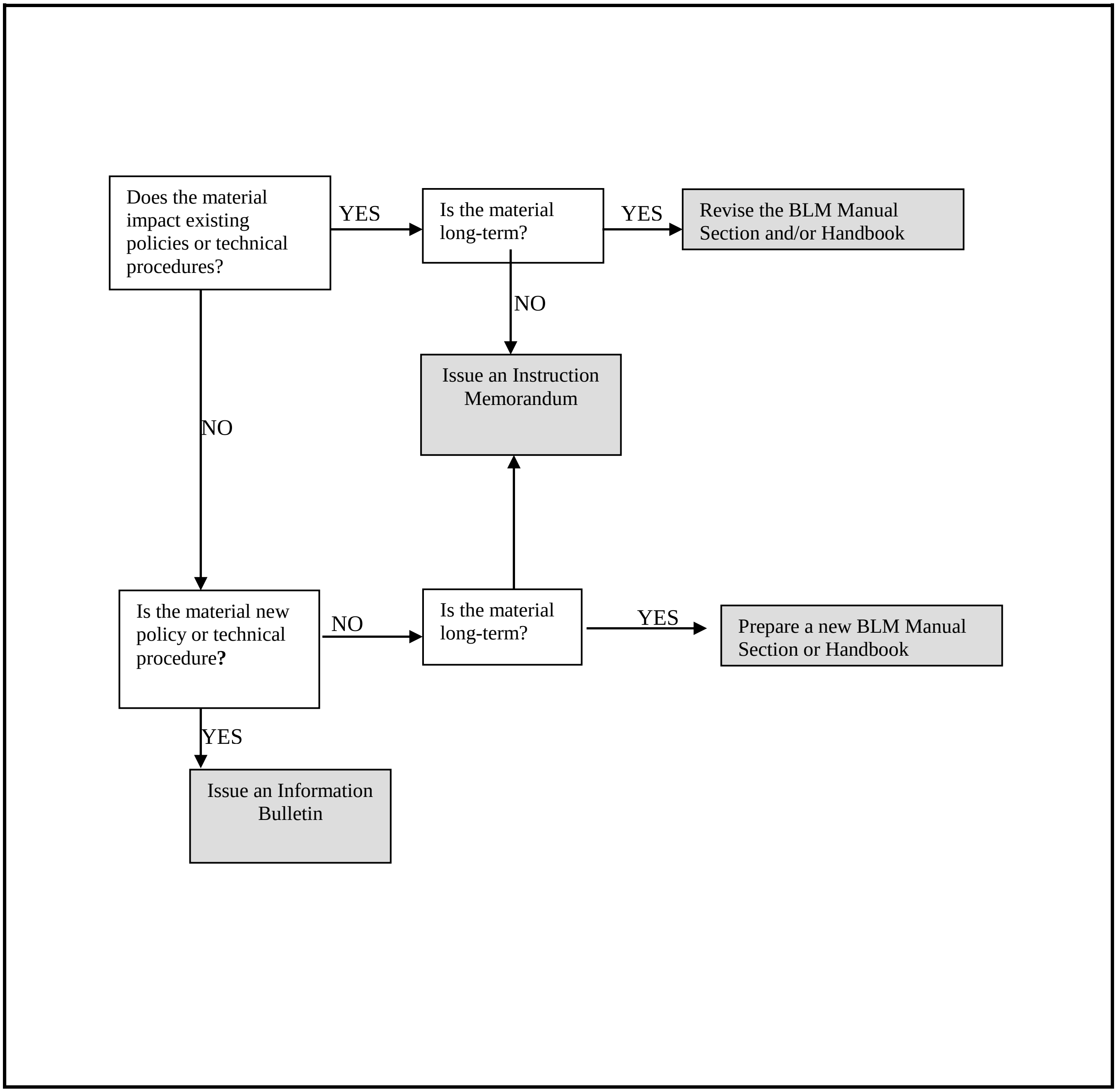

Illustration 3 – Example of an Instruction Memorandum

(See Chapter III, Paragraph P.)

This is an example of the format to use when preparing an Instruction Memorandum (IM).

UNITED STATES DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT
Washington, DC 20240
http://www.blm.gov

July 15, 2011

In Reply Refer To:
6300 (170) P

EMS TRANSMISSION 07/15/2011
Instruction Memorandum No. 2011-147
Expires: 9/30/2012

To: State Directors

From: Director

Subject: Identification of Areas with Broad Public Support for Possible Congressional Designation as Wilderness

DD: 9/1/2011

Program Area: Wilderness Resources Management

Purpose: To request that State Directors identify areas of public lands within their States that have strong local support for permanent protection under the Wilderness Act.

Policy/Action: State Directors will identify "crown jewel" BLM-managed areas that have broad support for Congressional designation under the Wilderness Act. Only those areas that are manageable as wilderness and have strong BLM Field Office and State Office support for wilderness designation should be identified.

Timeframe: Effective Immediately.

Budget Impact: None.

Background: On June 1, 2011, the Secretary issued a memorandum to the BLM Director in part directing the Department of the Interior to solicit input and develop a report to Congress on areas that may be appropriate candidates for congressional protection under the Wilderness Act.

Manual/Handbook Sections Affected: None.

Coordination: This IM has been coordinated with WO-200, WO-300 and WO-600.

Contact: Direct questions regarding this IM to Carl Rountree, Director, National Landscape Conservation System at (202) 208-3516, or Dave Harmon, Wilderness Lead, (202) 912-7177.

Robert V. Abbey
Director

2 Attachments
1 - Draft Letter (1 p)
2 - Press Release (2 pp)

Illustration 4 – Example of an Information Bulletin
(See Chapter III, Paragraph Q)

UNITED STATES DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT
WASHINGTON, D.C. 20240
http://www.blm.gov

August 5, 2010

In Reply Refer To:
2800 (350) P

EMS TRANSMISSION 08/06/2010
Information Bulletin No. 2010-095

To: All Field Officials

From: Assistant Director, Minerals and Realty Management

Subject: Bureau of Land Management Wind Energy Applications and Training Symposium

DD: 08/10/2010

The Wind Energy Applications and Training Symposium will be held from August 31 through September 2, 2010, at the National Renewable Energy Laboratory (NREL) in Golden, Colorado. NREL and the Department of Energy (DOE), in partnership with the Bureau of Land Management (BLM), invite you to participate in the workshop developed by NREL specifically for BLM personnel processing wind energy applications.

For over a decade, wind energy has been the fastest growing energy technology worldwide, achieving an annual growth rate of over 30 percent. In the United States, the current total installed capacity is approximately 35,000 megawatts from wind projects. Nearly 437 megawatts of this installed capacity is located on Federal lands in the western U.S. managed by the BLM. Secretary Salazar has made implementation of renewable energy resources on public lands a high priority for all Interior agencies.

We remain committed to maintaining a current knowledge-base for BLM employees on this robust and still emerging renewable energy program, offering a proactive course for completing the multi-faceted requirements of processing applications, adhering to environmental requirements, and managing the urgent need to develop Wind Energy on BLM-administered lands. We appreciate your continued support and assistance.

If you have any questions regarding this Information Bulletin, please call me at 202-208-4201, or your staff may contact Victor Lozano, Wind Energy Program Lead, WO-350, at 202-912-7085.

Timothy R. Spisak
Acting, Assistant Director
Minerals and Realty Management

Illustration 5 - Example of a Table of Contents

(See Chapter II, Paragraph D)

Table of Contents

Chapter 1. Overview .... **i**
1.1 Purpose x
1.2 Objectives x
1.3 Authority x
1.4 Responsibility x
1.5 References x
1.6 Policy x
1.7 File and Records Maintenance x
1.8 External Access to Bureau Directives x

Chapter 2. Directives System Structure .... **x**
2.1 Permanent Directives x
2.2 Temporary Directives x
2.3 Emergency Notifications (Email, Fax, Conference Call, etc.) x
2.4 Access Categories x
2.5 Directives Indexing System x

Chapter 3. Surnaming and Signing Directives .... **x**
3.1 Surnaming and Signing Officials x
3.2 Surnaming and Signing x
3.3 Surnaming and Signing Process x
3.4 Distribution x
3.5 Posting of Field Office and Center Directives x
3.6 Distribution to Other Agencies x

Chapter 4. Directives Maintenance .... **x**
4.1 Filing Directives x

Chapter 5. Revalidation of Directives .... **x**
5.1 Directives Issued by Headquarters. x
5.2 Directives Issued by Center, State, and Field Offices. x

Glossary of Terms x
Illustration 1 - Example of a Clearance Sheet (Form 1220-1) x

Illustration 6 – Example of a Glossary of Terms

(See Chapter II, Paragraph H)

Glossary of Terms

-A-

Alphabetical Index: A list of subject headings in alphabetical sequence accompanied by appropriate subject code(s) (see MS-1220, Records and Information Management, Appendix 2).

-D-

Directive: Any written communication issued by an authorized official to provide essential instructions and information for conducting work under that official's functional jurisdiction. A directive has general applicability, as distinguished from specific instructions given by a supervisor in an individual matter.

1. Permanent directive: A directive that contains instructions having continuing application to BLM operations. Permanent directives are issued in the form of BLM Manual Sections, Handbooks, and Supplements to Manual Sections and Handbooks.

2. Temporary directive: A directive that conveys information or contains instructions that require immediate attention or that may be in effect for a short period of time.

Illustration 7 – Example of a Bibliography

(See Chapter II, Paragraph H)

Bibliography

Bernstein, Theodore. The Careful Writer - A Modern Guide to English Usage. Atheneum, New York; latest edition available.

Hodges, John C. and Mary E. Whitten. Harbrace College Handbook. Harcourt, Brace & World, Inc., New York; latest edition available.

Roget's International Thesaurus. Thomas Y. Crowell Company, New York; latest edition available.

Strunk, William and E. B. White. The Elements of Style. MacMillan Publishing Company, Inc., New York; latest edition available.

U.S. Government Printing Office. U.S. Government Printing Office Style Manual. U.S. Government Printing Office, Washington, D.C.

Webster's New World Dictionary of the American Language. The World Publishing Company, New York; latest edition available.

Illustration 8 – Example of a Transmittal Sheet (Form 1221-2)

(See Chapter II, Paragraph I1b)

Form 1221-2
(September 2005)

Version ①

UNITED STATES

(BLM Emblem) **DEPARTMENT OF THE INTERIOR**
BUREAU OF LAND MANAGEMENT
New Mexico State Supplement ②
TRANSMITTAL SHEET

Date

MS 1221 – BLM Directives –(Internal) ③

④ 1. Explanation of Material Transmitted: This version completely revises BLM Manual Section 1221.

⑤ 2. Updated Material: Recipients of this Transmittal are advised that the old version of this directive has been superseded and the new version is available on the BLM Directives Website.

⑥

Vance Chipman, State Director

INSTRUCTIONS

1. Version Number and Date applied by IRM Policy and Records Group after release has been signed.
2. If document is a supplement, insert "Supplement" in this space. Otherwise leave blank.
3. Enter Manual Section or Handbook Number, title and access category here.
4. Brief summary covering contents of the version and highlighting the major changes in policy and procedures, and new or deleted material.
5. Insert the standard text identified under this section.
6. Enter the signing official's name and title below the end of the text.

Illustration 9 - Directive Review and Certification (Form 1221-3)

Form 1221-3
(January 2009)

UNITED STATES DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT
DIRECTIVE REVIEW AND CERTIFICATION

To:
Through:
From:

Manual/Handbook/ Instruction Memorandum No	Version	Date	Title

BLM officials are responsible for keeping directives current and ensuring that directives are cancelled when no longer needed. Please review the directive identified above based on the following criteria:

- **The potential conflict with law, regulations, and written policy within the material. Identify policy questions, delegation of authority issues, areas of disagreement, or other issues that require resolution.**
- **The degree of conflict and inconsistency within the directive or with related directives, including other Manuals, Handbooks, or IMs.**
- **The nature and extent of complaints or comments received which suggest the material does not meet the needs of the user. Consider internal and external evaluation reports that indicate conflicts, deficiencies, and additional coverage needed. Review IMs on subject. Is there a low degree of compliance?**
- **The degree to which the material is consistent with BLM policy on decentralization of operational functions.**
- **The potential for simplification, efficiency, and relief of unnecessary administrative burden.**
- **Condition status (Check one):**

_____ No Longer Needed or Obsolete (to be canceled) **_____ New Manual/Handbook Required***

_____ Substantive Revision Required * **_____ Minor Changes Required***

_____ Current as Written

*** Revision will be provided by ___________ (within 6 months)**

If greater than 12 months, provide justification and date when revision will be completed.

Comments:

Recommended by: _____________________ **Approved by:_________________________**

Program Specialist **(Signature and Date)**

Bibliography

Bernstein, Theodore. The Careful Writer - A Modern Guide to English Usage. Atheneum, New York; latest edition available.

Hodges, John C. and Mary E. Whitten. Harbrace College Handbook. Harcourt, Brace & World, Inc., New York; latest edition available.

Roget's International Thesaurus. Thomas Y. Crowell Company, New York; latest edition available.

Strunk, William and E. B. White. The Elements of Style. MacMillan Publishing Company, Inc., New York; latest edition available.

U.S. Government Printing Office. U.S. Government Printing Office Style Manual. U.S. Government Printing Office, Washington, D.C.

Webster's New World Dictionary of the American Language. The World Publishing Company, New York; latest edition available.

APPENDIX

Acronyms and Abbreviations

Spell out each acronym prior to use and follow with the acronym in parentheses (e.g., Annual Work Plan (AWP)).

ACEC	Area of Critical Environmental Concern
AD	Assistant Director
AFOs	All Field Officials
APD	Application for Permit to Drill
ASD	Associate State Director
AWP	Annual Work Plan
BLM	Bureau of Land Management
CD	Center Director
CFR	Code of Federal Regulations
COB	Close of Business
COLA	Cost of Living Adjustment
DD	Due Date
DD	Deputy Director
DM	District Manager
DO	District Office
DOI	Department of the Interior
EA	Environmental Assessment
EEO	Equal Employment Opportunity
EO	Executive Order
EOY	End of Year
EIS	Environmental Impact Statement
FLPMA	Federal Land Policy and Management Act
FOIA	Freedom of Information Act
FR	Federal Register
FRC	Federal Records Center
FY	Fiscal Year
GIS	Geographic Information System
GME	General Management Evaluation
IBLA	Interior Board of Land Appeals
IM	Instruction Memorandum
MOU	Memorandum of Understanding
MS	Manual Section
MTP	Master Title Plats
NEPA	National Environmental Policy Act
OPF	Official Personnel File
PAWP	Preliminary Annual Work Plan
PD	Position Description
PD	Public Domain
PL	Public Law
PLO	Public Land Order
PLS	Public Land Statistics
POV	Privately Owned Vehicle
RFB	Request for Bid
RFP	Request for Proposal
SD	State Director
SRP	Special Recreation Permits
T&A	Time and Attendance
T&R	Township and Range
TA	Travel Authorization
TO	Table of Organization
WM	Work Month
WO	Washington Office
WSA	Wilderness Study Area