

WINGS OF CAROLINA FLYING CLUB
FORMS MANAGEMENT PROCEDURES

1. CREATION

- A. NEED. We hope to provide a uniform “look and feel” to WCFC documents through the adaptation of these document standards and procedures. This will, we hope, convey professionalism within the club, and an inspiration to those proposing new documents and forms to be added to the club inventory of “official” documents.

The club’s document inventory SHOULD include documents we use within the club for management, administration, record keeping, and training purposes. Documents in our inventory ought to have substantial content generated by club members for club purposes.

We SHOULD NOT include documents in our inventory if they are identical (or nearly so) to documents available through other sources, e.g., FAA, AOPA, etc. Foreign-source documents in our inventory could be superseded by changes in the original source, leaving anyone holding (or obtaining from our inventory) an obsolete document.

B. MS Word Document Template

1. A document template, WCFC.dot is available in the club document archive as document number 0.03. This template incorporates all the style elements suggested in the following section.

- C. FORMAT. The format of a document should be primarily for communicating. Forms should be easy to understand and fill out. If possible, our documents should be aesthetically pleasing, and should match other documents in the inventory. The guidelines below should be the starting point for new documents

1. MARGINS (DEFAULT) (Selected for (1) ease of remembering, (2) maximum use of available space on the page, and (2) uniform and pleasing margins.)

- i. TOP 0.5”
- ii. LEFT 0.5”
- iii. RIGHT 0.5”
- iv. BOTTOM 0.5”
- v. HEADER 0.5”
- vi. FOOTER 0.5”

2. HEADER / FOOTER INFORMATION

- i. Footer content and format:

1. FORM Number – at the left margin

- a. Name the file “FORM x.yz.doc”, then insert at the left margin a field containing the file name. Thus you can copy ‘n’ paste any standard footer into your document and it will pick up the form (file) name “automagically”.

2. Revision date – left tab at 2.0” for 8 ½ x 11 portrait orientation, 3.5 for landscape.

- a. Insert a field containing the SaveDate.

3. Owner Name – left tab at 4” for 8 ½ x 11 portrait orientation, 6” for landscape

- a. The “Owner” of the document is the person or position within WCFC who is responsible for the form’s content. For example all forms/documents relating to training would be “owned” by the Chief

Flight Instructor. Try to use position titles rather than individual names because things change.

4. Pagination
 - a. Insert at the right page margin fields for the current page number and the total number of pages, separated by " of ". This should print as "x of y"
5. Type Face and Weight
 - a. Please format page footers in Arial 10 point, BOLD.
6. HINT: Copy and Paste the footer from this document into your new document. Change the Owner name or title. Before pasting into your document's footers:
 - a. Be sure the "Same as Previous" button in the "View Headers and Footers dialog is NOT on in ANY footer you have already created.
 - b. Be sure, in Page Setup, that "Different First Page is NOT checked.

ii. Header Content and Format

1. The header of your document should indicate the document content under the header. For example, there are four different headers in the Member Handbook (including one header with no printing in it). Choosing header information is a matter for the author.
 - a. It should not duplicate information in the footer.
 - b. An empty header is often appropriate.
 - c. Repeating the document title in the header after the first page of a multi-page document is a good convention to follow. (Under Page Setup, check "Different First Page". Do this while the Header and Footer dialog is showing the header ONLY, so the footers are not affected by the change.)

3. FONT

- i. We prefer Arial 11 point as the default font for body text, as it is easy to read and pleasing to the eye. Studies have suggested that sans-serif fonts like Arial are more readable than serif fonts like Times New Roman, which is why highway signs have letters without serifs.
- ii. Avoid multiple fonts within the same document, except for good reason.

D. NUMBERING

1. 0.xx – Forms Management Information
2. 1.xx – Club Information
3. 2.xx – Training & Flight Support
4. 3.xx – Administration
5. 4.xx – Additional Aircraft Documents
6. 5.xx – Equipment Documents
7. 6.xx – Member Handbook
8. 7.xx – Graphics

9. 8.xx – Unassigned

10. 9.xx – Archived/Unused/Obsolete

2. Revising, Adding, and Deleting Documents

- a. Revisions to a document's content or its active status are accomplished through the use of the Document Change Request (DCR), which is Form 0.04.doc. This is a MS Word form that provides four steps in updating a document:
 - 1. Originator Statement
 - 2. Document Control Officer (DCO) Action
 - 3. Document Owner Action
 - 4. DCO Final Disposition
- b. To initiate a change, including a recommendation to add a document to the inventory or remove a document from the inventory, the initiator fills in the open fields in Part 1, saves the form to her/his local disk, and forwards the form to the DCO.
 - i. For a new document recommendation the DCR should be accompanied by a draft of the new document. Specific directions and new text as appropriate should accompany recommendations for significant changes.
 - ii. For changes to an existing document that are numerous and pervasive, including significant formatting changes, the initiator should obtain the current source file from the archive or by emailing the DCO, open the document, turn on "red-lining"¹, make the changes, and email the changed document with the DCR to the DCO.
- c. The DCO will note in Section 2 the document owner (by name), and check the DCR for completeness. Once it is complete, the form and other supporting documents will be forwarded to the owner for review.
- d. The document owner, at his/her discretion, can forward the DCR to other reviewers, who will return their comments to the document owner. The document owner will then note in Section 3 his recommendation for the disposition of the DCR and return it to the DCO.
- e. The DCO will dispose of the DCR as recommended, and will update the document file as necessary, with annotations shown in Section 4. The completed DCR will be stored in the document folder with an appropriate file name indicating the date of the change.

3. Maintenance

- A. Master Electronic Copy. The master electronic copy of any WCFC document is stored on a network disk ("Snap Drive") at the club offices. The network drive is known as "NETWORK NAME HERE", and is accessible from any networked PC at the club. Specific documents are located in subdirectories named after the document form number as follows: "Form x.yz" and its supporting documents will be stored in a folder named "x_yz" – replacing the period in the form number with an underscore.
- B. README File. Each document folder should have a README file. We suggest the file be in MS Word format, but any widely-readable format like Rich Text Format (RTF) or just plain ACSII TXT will do: the content is important, not the format. The README file is meant to provide background for the document (if not obvious) and revision history. If the associated document is "complex", the README may provide guidance as to how the document should be maintained. For example, the WCFC membership applications, if changed, all need to be re-linked to the Application Cover Letter and the NC Driver License information request form. See Appendix A for a sample README file.
- C. Reproduction. The Club Manager is responsible for maintaining an adequate supply of expendable forms in the club "forms file". The Snap Drive folders containing expendable forms should also contain

¹ In MS Word, click Tools>Track Changes>Highlight Changes... and check Track changes while editing.

PDFs of the form. For forms that must be reproduced in quantity, if WCFC has a Kinko's account, the PDF can be emailed to them, and they can print from that. For other forms with less turnover, it is probably best to just open the files and print them locally. (NOTE: The Treasurer or others may have alternative wording for this section. Just let me know....)

- D. Retirement. When a document or form in the club inventory is no longer needed or used, it should be retired. This entails removing any copies (paper or electronic) from public access points. The original electronic copies and supporting documents are preserved for historical purposes in non-active, archival storage.
- a. After securing approval from the document's owner (through the Document Change Request mechanism), the directory containing the retiring document and any supporting files should be moved into (as a subdirectory to) the 9_0 (Archive) directory on the snap drive.
 - b. Any public file folders containing hard copies of the retiring document should be removed, and any hard copies destroyed.
 - c. Any online copies of the retiring document (e.g., on the web site) should be removed.

Appendix A. Sample README File

-----Begin Sample-----

Document Name	WCFC File Number	Document Owner
Handbook for Members (MS Word)	6.12	Vice President

Document History

Date	Summary of Change(s)
10/15/06	Received MS Word copy of Version 5.3 of the Handbook. It had apparently been scanned and OCRd into Word. Extensive editing was done (Jim Brooking) to add markup needed for Word to produce a Table of Contents and an Index. Keith Silva provided updates to bring the document to Version 5.4 and then to Version 5.5. (NOTE: Tabbing out of this box will cause another row to be created in the table.)

-----End Sample-----