

## *RELATIONSHIPS*

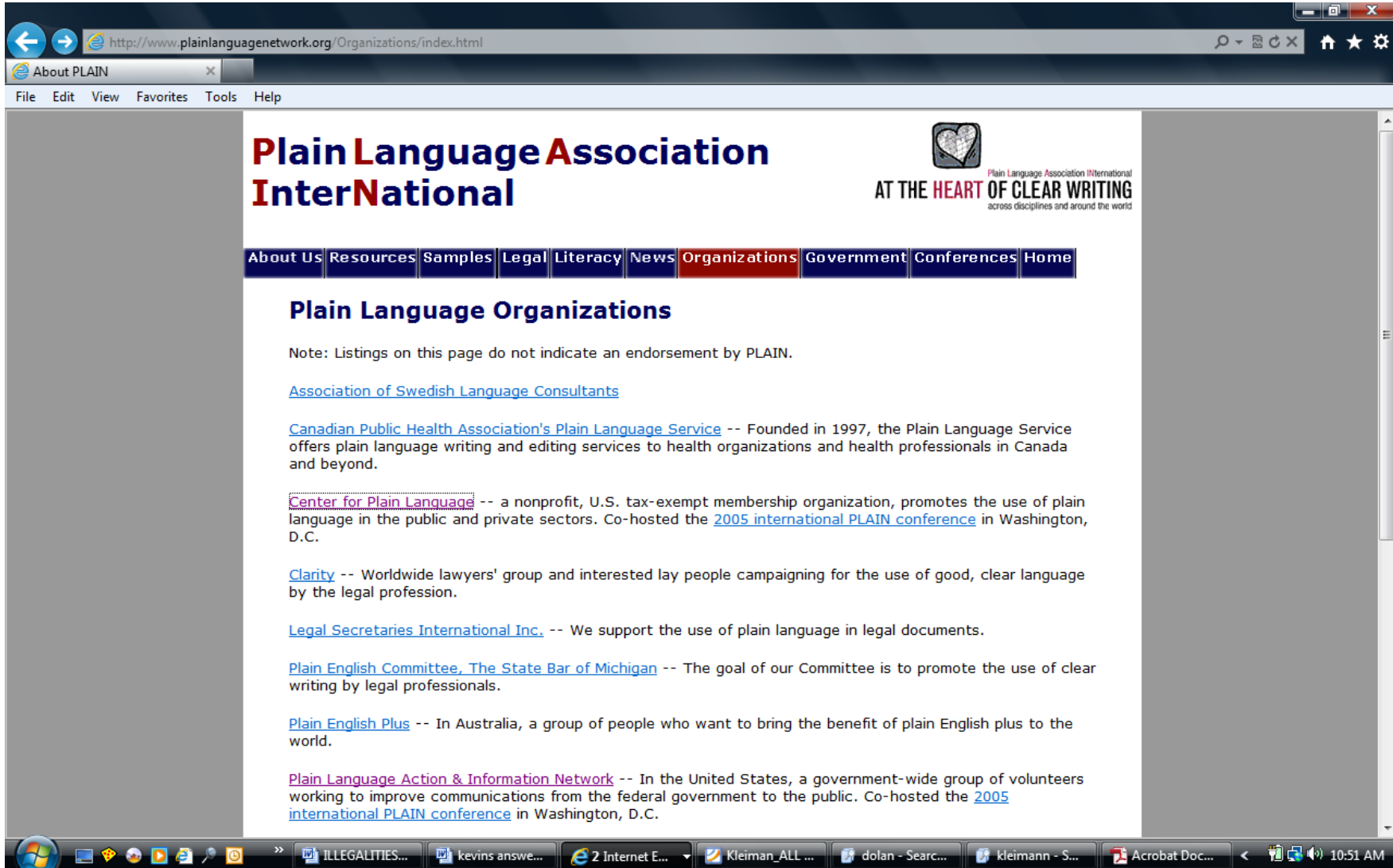
*Federal executives Lisa Ross, Nancy Killefer, Melodie Mercer and Annetta Cheek passed TWC's contract to Cheek's and Mercer's close friend, Susan Kleimann of Kleimann Communications Group (KCG)*

### **MELODIE MERCER, ANNETTA CHEEK, SUSAN KLEIMANN**

Mercer, Cheek, and Kleimann's relationship was centered around the following writing projects/initiatives:

- **NPR Plain Language Writing Initiative:** NPR was an interagency task force undertaken during the Clinton Administration intended to reform the way the U.S. federal government worked. When introduced, it was expected the initiative would involve a six-month review of the federal government under the leadership of the Vice President Al Gore. But NPR continued over several years and was eventually renamed the National Partnership on Reinventing Government in early 1998. One of NPR's undertakings involved promoting plain writing in government.
- **PLAIN: Plain Language Action & Information Network** was formed in 1993. Annetta Cheek—NPR Plain Language Coordinator--served as the chair from the date of the group's inception until she retired in 2007. Mercer is also a longstanding member of PLAIN, having served on PLAIN's Board. PLAIN—composed of federal employees like Cheek and Mercer—utilizes writing consultants such as Kleimann to help simplify government documents at their agencies.
- **Non-profit Center for Plain Language:** The Center for Plain Language is a non-profit organization formed by Mercer, Cheek and Kleimann in 2003. The Center for Plain Language website lists the organization's goals as follows:  
We support those who use plain language, train those who should use plain language, and urge people to demand plain language in all the documents they receive, read, and use.
  - Advocate for people to use, learn, and teach plain language in government, business, non-profits, and universities.
  - Give people information and tools they need to achieve their plain language goals.
  - Do and share research that identifies best practices for using, learning, and teaching plain language.
  - Coordinate activities, such as workshops and presentations that help people know more about and use plain language.

The following screen print provides additional information about the Center for Plain Language and Plain Language Information and Action Network:



The screenshot shows a web browser window displaying the website for the Plain Language Association International. The browser's address bar shows the URL: <http://www.plainlanguagenetwork.org/Organizations/index.html>. The website header features the title "Plain Language Association InterNational" in a large, bold, blue and red font. To the right of the title is the organization's logo, which consists of a heart shape made of small squares, with the text "Plain Language Association International" and "AT THE HEART OF CLEAR WRITING" below it. A navigation menu is located below the header, with the "Organizations" link highlighted in red. The main content area is titled "Plain Language Organizations" and includes a note: "Note: Listings on this page do not indicate an endorsement by PLAIN." Below the note are several links to other organizations, each followed by a brief description:

- [Association of Swedish Language Consultants](#)
- [Canadian Public Health Association's Plain Language Service](#) -- Founded in 1997, the Plain Language Service offers plain language writing and editing services to health organizations and health professionals in Canada and beyond.
- [Center for Plain Language](#) -- a nonprofit, U.S. tax-exempt membership organization, promotes the use of plain language in the public and private sectors. Co-hosted the [2005 international PLAIN conference](#) in Washington, D.C.
- [Clarity](#) -- Worldwide lawyers' group and interested lay people campaigning for the use of good, clear language by the legal profession.
- [Legal Secretaries International Inc.](#) -- We support the use of plain language in legal documents.
- [Plain English Committee, The State Bar of Michigan](#) -- The goal of our Committee is to promote the use of clear writing by legal professionals.
- [Plain English Plus](#) -- In Australia, a group of people who want to bring the benefit of plain English plus to the world.
- [Plain Language Action & Information Network](#) -- In the United States, a government-wide group of volunteers working to improve communications from the federal government to the public. Co-hosted the [2005 international PLAIN conference](#) in Washington, D.C.

The Windows taskbar at the bottom of the screen shows several open applications, including "ILLEGALITIES...", "kevins answe...", "Internet E...", "Kleiman\_ALL ...", "dolan - Searc...", "kleimann - S...", and "Acrobat Doc...". The system clock in the bottom right corner indicates the time is 10:51 AM.

The following firms/individuals conspired to divert TWC's IRS Notice Redesign Contract to Kleimann Communications Group (KCG):

- **Annetta Cheek:** In 1996, Annetta Cheek became head of Vice President Gore's National Performance Review/ National Partnership for Reinventing Government (NPR) plain language writing initiative. She is reportedly one of the first federal employees involved in the plain language movement. Cheek's charge at NPR was to spread the plain language initiative across the federal government. Cheek helped found the Plain Language Action and Information Network (PLAIN), a group of federal employees promoting plain language and served as its chair until her retirement from government in early 2007. She also developed PLAIN's original website and oversaw its redesign in 2004-2005. In 2003, Annetta and several plain language colleagues founded the nonprofit Center for Plain Language in Washington, DC.
- **Melodee Mercer:** Mercer served on the Board of PLAIN & Center for Plain Language from 1990 to 2009, along with Annetta Cheek. She also worked at NPR from 1995 to 2000, with Annetta Cheek. Mercer was a member of the Veteran Benefits Administration's Simplified Communication Task Force charged with exporting plain writing standards and tactics throughout the organization before she joined NPR.
- **Nancy Killefer:** Nancy Killefer was a Director in the Washington, D.C., office of McKinsey & Company—a global management consulting firm. Killefer left McKinsey & Company from 1997 to 2000 to serve as Assistant Secretary for Management, Chief Financial Officer (CFO), and Chief Operations Officer (COO) at the United States Department of the Treasury. After returning to McKinsey in 2000, she joined the **IRS Oversight Board**, a public-private entity akin to a corporate board that oversees the IRS. She served there from 2000 to 2005 and was its Chairperson from 2002 to 2005. Killefer and Ross spearheaded the effort to divert TWC's contract to NPR (Cheek and Mercer) and Kleimann—all of whom benefitted personally from the contract.
- **Lisa Ross:** Ross joined the Department of Treasury in 1998 as the Deputy Assistant Secretary for Strategy Finance. When Killefer resigned, President Clinton nominated Lisa Ross-McGonigle as Killefer's replacement. Prior to joining the U.S. Treasury, Ross served as Vice President of Strategic Planning for Marriott International and a consultant with McKinsey & Company. Pursuant to the Chief Financial Officers Act of 1990, both Ross and Killefer were charged with ensuring sound financial management practices and outcomes within Treasury bureaus and proper stewardship of taxpayer funds.
- **Susan Kleimann:** Kleimann formed Kleimann Communications Group in November 1997—some seven days after IRS promised TWC the Notice Redesign Contract. Kleimann and business partner Barbra Enlow worked closely with Annetta Cheek and Melodee Mercer on the NPR plain language effort headed by Vice President Gore. She, Mercer and Cheek were also founding members of PLAIN. Kleimann worked with Mercer on projects at Veterans Benefits Administration (VBA). Kleimann also worked with Cheek and Mercer at NPR.

**EVIDENCE OF RELATIONSHIP BETWEEN KLEIMANN AND BUSINESS PARTNER ENLOW AND CHEEK AND MERCER  
BEFORE OR DURING TWC'S IRS NOTICE REDESIGN CONTRACT**

Susan Kleimann published an article in 1998 in a publication named *Rapport* (*printouts of the publication appear on a series of pages that follow*). The article was titled *U.S. Government Activities in Plain Language*. The article reveals the following about Kleimann, Cheek and Mercer's relationship:

- Kleimann knew Annetta Cheek in 1998, since she references her in the publication.
- Kleimann knew Melodie Mercer in 1998, since she speaks extensively about PLAIN—an organization in which Cheek and Mercer had a leading role.
- Kleimann and Mercer jointly authored documents that were used at PLAN/PLAIN meetings as examples of plain language writing approaches and techniques.

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Kappale

Issue #21, 1998

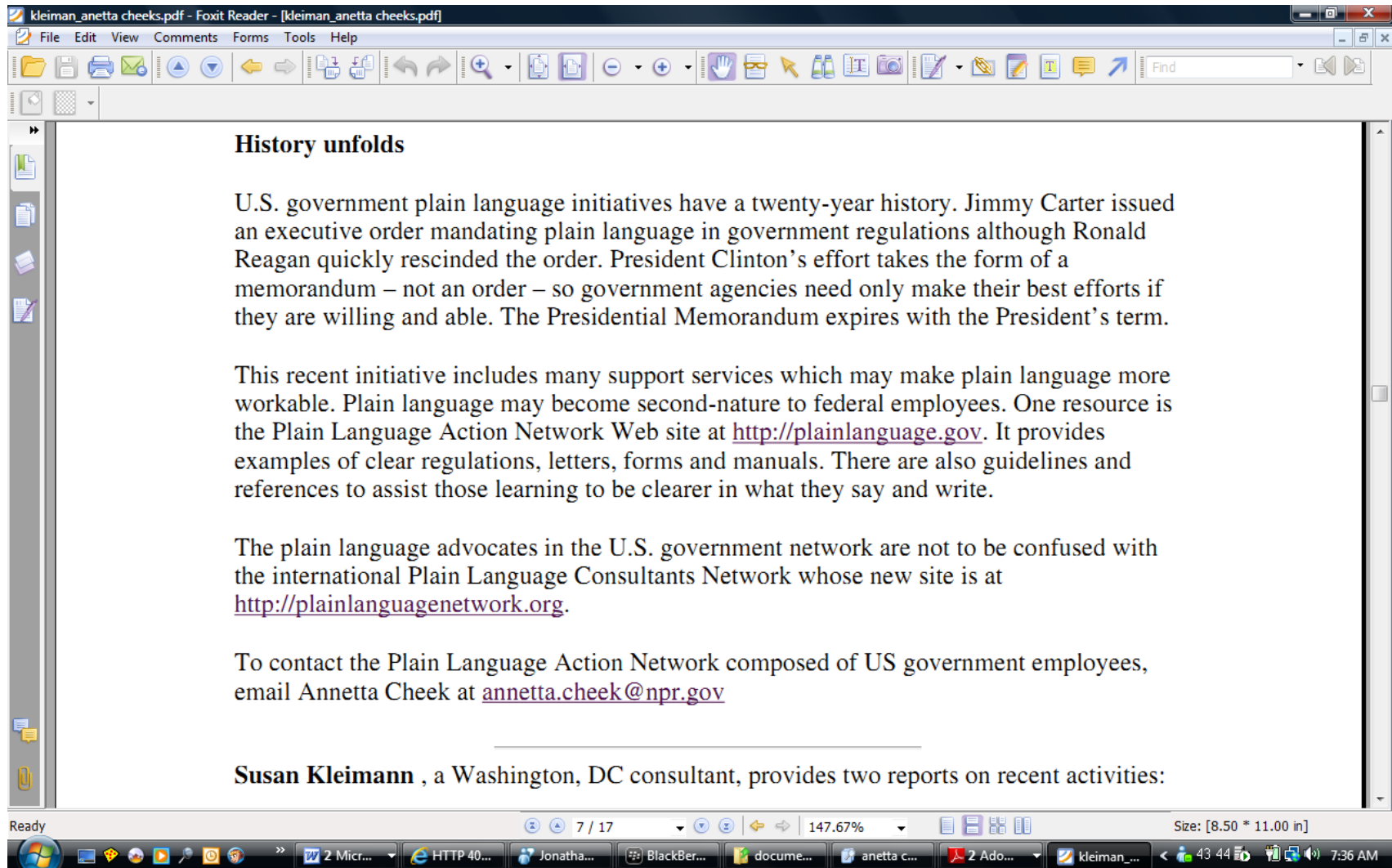
In this issue:

1. We Use English Here, the Editor
2. News from Sweden, *Barbro Ehrenberg-Sundin*
3. Language Perils
4. What's It Going To Take For You To Use Plain English?  
an interview with Irene Leonard
5. Generation Next, *Janet Dean*
6. Recent U.S. Government Activities in Plain Language  
with two notes from Susan Kleiman
7. Globalisation of Plain Language: Profile of a European Project, *Kate Harrison*
8. Plain Language Conferencing
9. Working Ethically in Plain Language, *Jamie McKinnon*
10. International Literacy Day, *Plain Language Consultants Network*

Ready 1 / 17 147.67% Size: [8.50 \* 11.00 in]

2 Mic... Sprachk... Jonatha... BlackBer... 3 Win... 2 Ado... Docume... kleiman\_... 46 46 7:49 AM

Susan Kleimann references Annetta Cheek in article she is writing on Recent U.S. Government Activities in Plain Language. Kleimann is writing about the undertakings of Gore's plain writing effort headed by Cheek.



➤ The article written by Kleimann that appeared in *Rapport* begins below:

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Susan Kleimann , a Washington, DC consultant, provides two reports on recent activities:

**This Much Is Clear: Plain Language Is Back!**

At long last, on June 2, 1998, Vice President Al Gore announced a Presidential Memorandum on Plain Language in government. In this memorandum, President Clinton directed government agencies

<a href="http://www.gopdg.com/plainlanguage/Rapport/rap21.html">http://www.gopdg.com/plainlanguage/Rapport/rap21.html</a>	12/30/2007
Rapport - News About Plain Language - # 21	Page 8 of 17

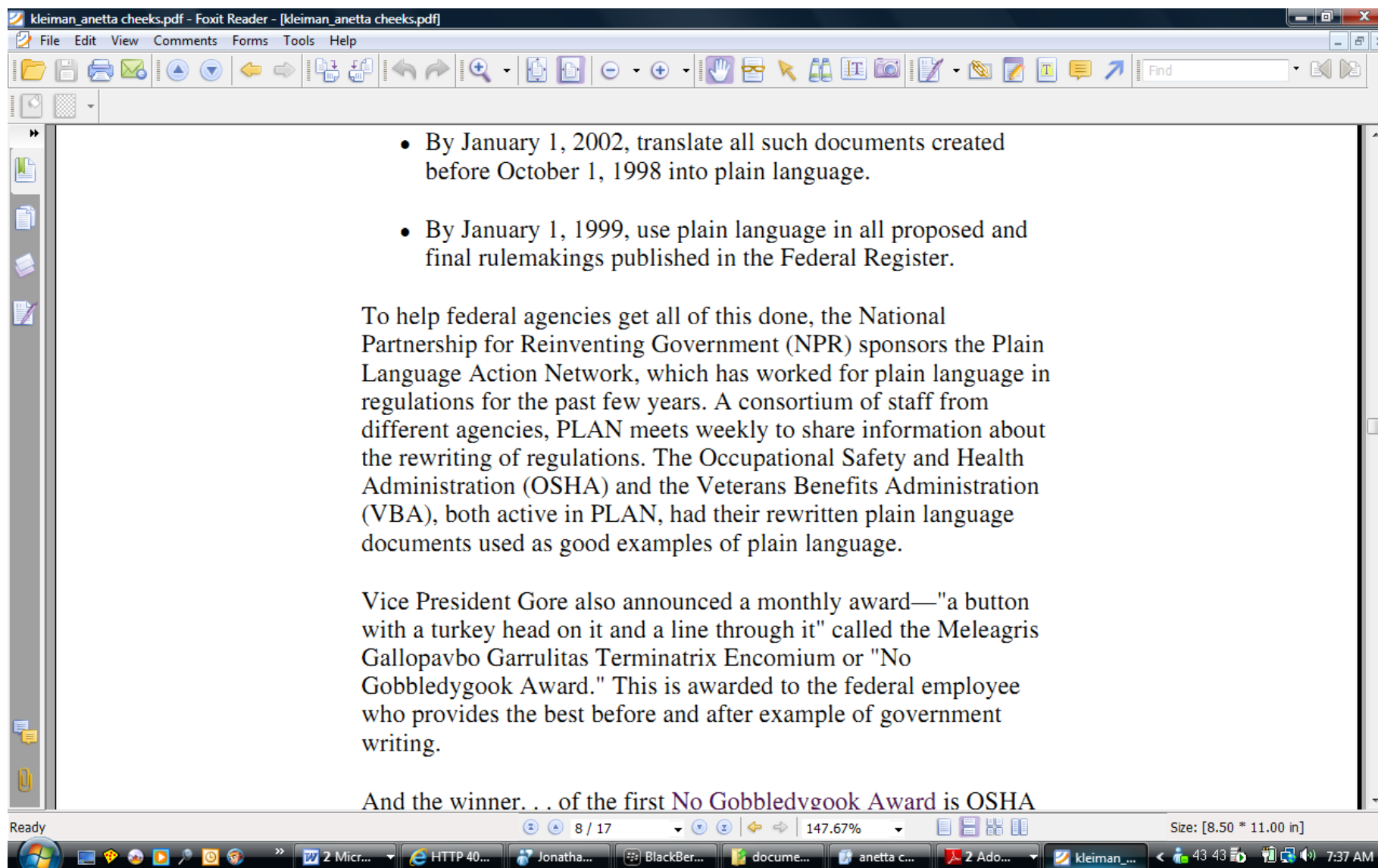
to swap the gobbledygook of bureaucratese for plain language. Here's the timetable for federal agencies:

- By October 1, 1998, use plain language for all documents, other than regulations, that explain how to obtain a benefit or service or how to comply with a requirement. These

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A section of the newsletter *Rapport* dated 1998 (which is continued below) describes PLAN/PLAIN:



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- By January 1, 2002, translate all such documents created before October 1, 1998 into plain language.
- By January 1, 1999, use plain language in all proposed and final rulemakings published in the Federal Register.

To help federal agencies get all of this done, the National Partnership for Reinventing Government (NPR) sponsors the Plain Language Action Network, which has worked for plain language in regulations for the past few years. A consortium of staff from different agencies, PLAN meets weekly to share information about the rewriting of regulations. The Occupational Safety and Health Administration (OSHA) and the Veterans Benefits Administration (VBA), both active in PLAN, had their rewritten plain language documents used as good examples of plain language.

Vice President Gore also announced a monthly award—"a button with a turkey head on it and a line through it" called the Meleagris Gallopavbo Garrulitas Terminatrix Encomium or "No Gobbledygook Award." This is awarded to the federal employee who provides the best before and after example of government writing.

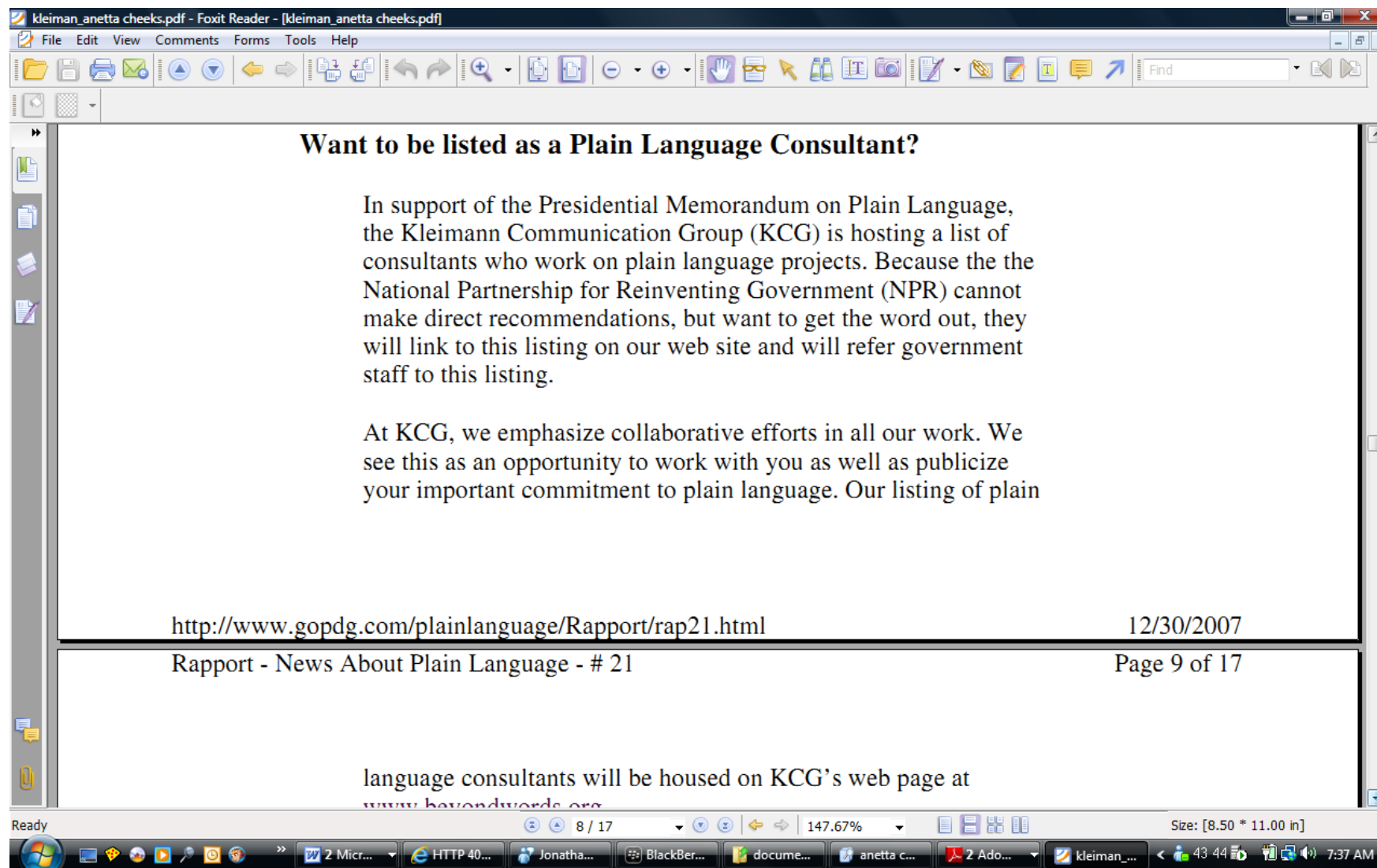
And the winner. . . of the first **No Gobbledygook Award** is OSHA

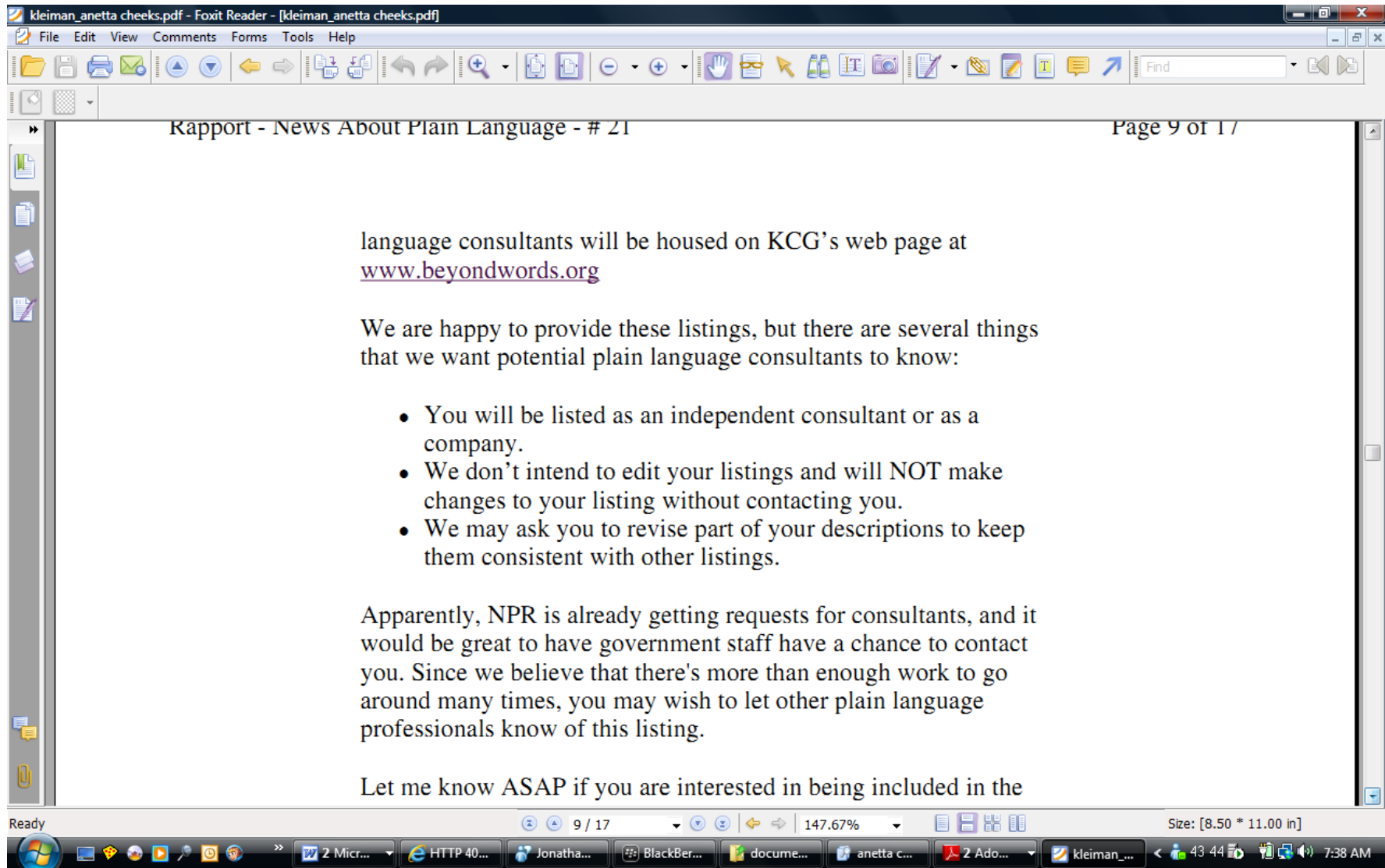
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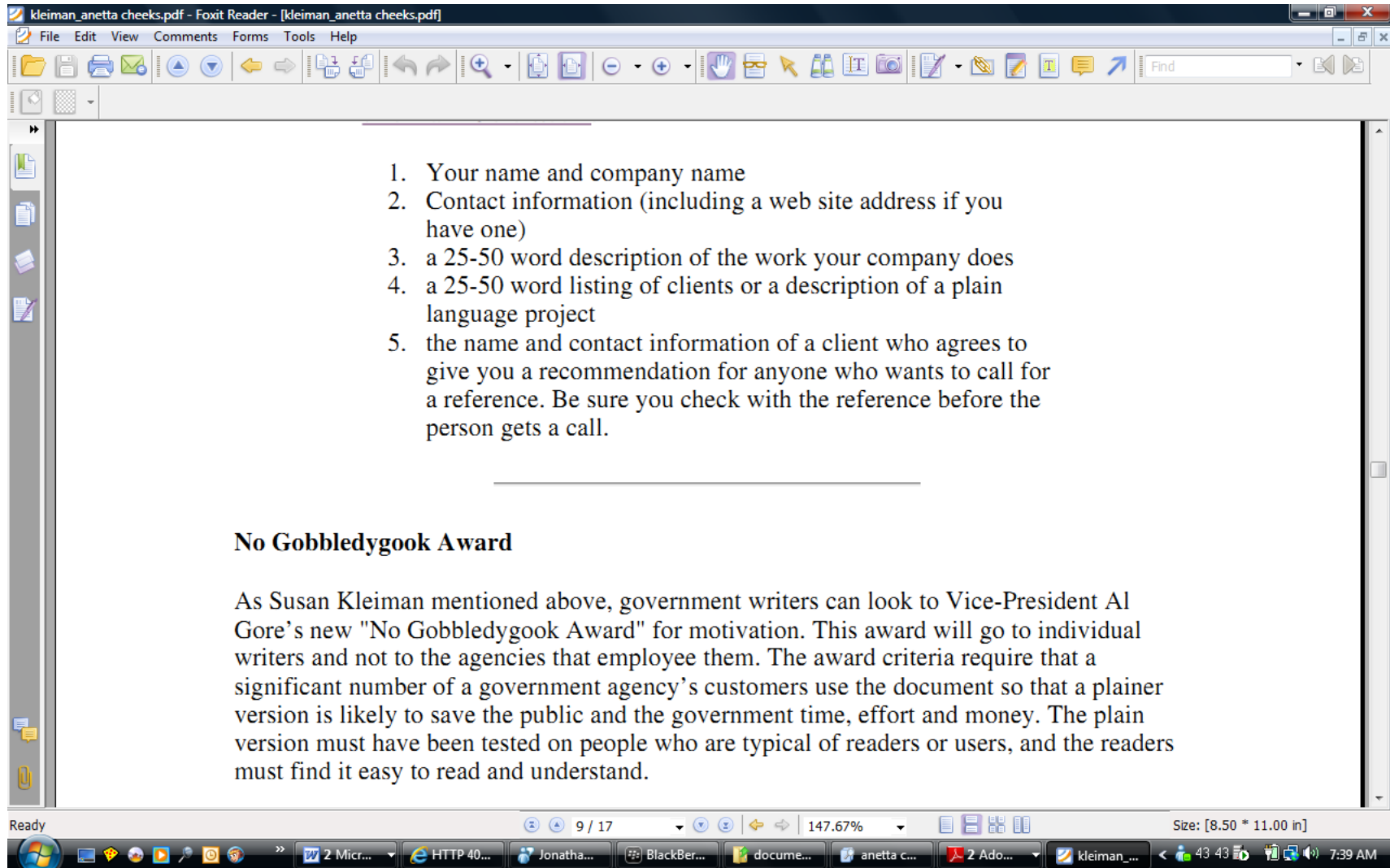
Windows taskbar: 2 Micr..., HTTP 40..., Jonatha..., BlackBer..., docume..., anetta c..., 2 Ado..., kleiman\_..., 43 43, 7:37 AM



The following section of the article that appeared in *Rapport* reveals NPR linked a government website to Susan Kleimann's website. The article also states NPR referred government staff and members of PLAIN/PLAN who were looking for writing consultants to KCG's website. NPR gave Kleimann preferential treatment when they linked to Kleimann's site and direct government staff to Kleimann's site.







. November-December 1998 Publication of *VANGUARD*  
Article on Melodee Mercer

The screenshot shows a web browser window with the following content:

**CONTENTS**

<input type="checkbox"/> Carey Award Winners	4-5
<i>Denver Distribution Center takes trophy</i>	
<input type="checkbox"/> Homeless Grants	5
<i>26 awarded to non-profit groups</i>	
<input type="checkbox"/> Wheelchair Games	6-7
<i>Athletes go for the gold in Pittsburgh</i>	
<input type="checkbox"/> Budget Bill Signed	8
<i>VA funded at \$42.6 million</i>	
<input type="checkbox"/> Foreign Office	9
<i>Staff oversees international activities</i>	
<input type="checkbox"/> Plain Language	10-11
<i>Government writing initiative launched</i>	
<input type="checkbox"/> Workplace Violence	13
<i>VA employee offers prevention training</i>	

**INTRODUCING**  
Melodee Mercer

Melodee Mercer is a federal plain language pioneer whose time has finally come. She has worked 16 years at the VA Insurance Center in Philadelphia, but her expertise in clear, understandable writing has made her presence felt throughout government.

The October 1 launch of the President's Plain Language in Government Writing program has made clear, understandable communication the standard for federal writers. That's something Melodee has long advocated and is now doing something about as one of the federal government's

She was detailed to VA Central Office for four months during the summer of 1996 and, with the help of VBA's newly established satellite television network, taught the basics of Reader Focused Writing to 800 employees in 32 offices.

"We were on the air four to six hours a day, five days a week," she recalled. "We knew we had a great product and all that practice honed the presentation into an effective package."

Vice President Gore vouched for that in June when he presented VBA and its RFW team the NPR Hammer Award for leading the

Page 17    Sec 1    17/23    At 9.3"    Ln 4    Col 65    REC | TRK | EXT | OVR    English (U.S.)    2 / 20    145.71%    Size: [8.50 \* 11.00 in]

Taskbar: 3 Micros..., 3 Internet..., Jonathan <..., BlackBerry..., 5 Windo..., 8 Adobe..., 2 WordPad, 10:03 AM

## November-December 1998 Publication of VANGUARD

The following section of *Vanguard* speaks of Mercer's significant involvement in NPR's writing effort—headed by Cheek. It says “Last year, she was detailed to NPR in Washington and wrote the “Letter writing” guidance now on the NPR plain language web site at www. . . .

The screenshot shows a web browser window displaying the November-December 1998 issue of Vanguard magazine. The browser's address bar shows the URL: <http://www.va.gov/opa/publications/archives/vanguard/98NovDecVG.pdf>. The browser's search bar contains the text "melodee mercer". The page content includes a sidebar with "Veterans Day 20" and "Columns 14-19". The main article is titled "On The Cover:" and discusses the American Legion "27 Flags" parade. A photograph of Melodee Mercer is shown. The article text includes: "Writing is something almost every VA employee does on the job," she said. "And plain language writing does make a difference. When you begin to focus as much on who you are writing for as on what you are writing about, you can't help but increase understanding, and that changes the entire process." It also mentions that she was detailed to NPR in Washington and wrote the "letter writing" guidance. The footer of the page indicates it is Page 18, Section 1, and includes system information like "10:03 AM".

**Veterans Day** 20  
*Observances held across the nation*


**COLUMNS** 14-19

**On The Cover:**  
Members of the American Legion "27 Flags" from Maryland parade into the Memorial Amphitheater at the start of the annual Veterans Day ceremony at Arlington National Cemetery. They represent the history of the American flag in the state — 27 versions have flown over Maryland from colonial times to the present as states were added to the union.

**Vanguard**  
VA's Employee Magazine  
November/December 1998  
Vol. XLIV, No. 7  
Printed on 50% recycled paper

**Editor:** Lisa Respass  
**Graphics:** Michael Nacincik

government's leading plain language experts.  
"Writing is something almost every VA employee does on the job," she said. "And plain language writing does make a difference. When you begin to focus as much on who you are writing for as on what you are writing about, you can't help but increase understanding, and that changes the entire process."  
It made a big difference in Melodee's life. In 1993 she was called back to work early from a vacation to take part in local training aimed at helping the Insurance Center revamp its pattern letters used to respond to veterans' inquiries.  
That work earned Melodee a place as eastern region representative on VBA's Simplified Communication



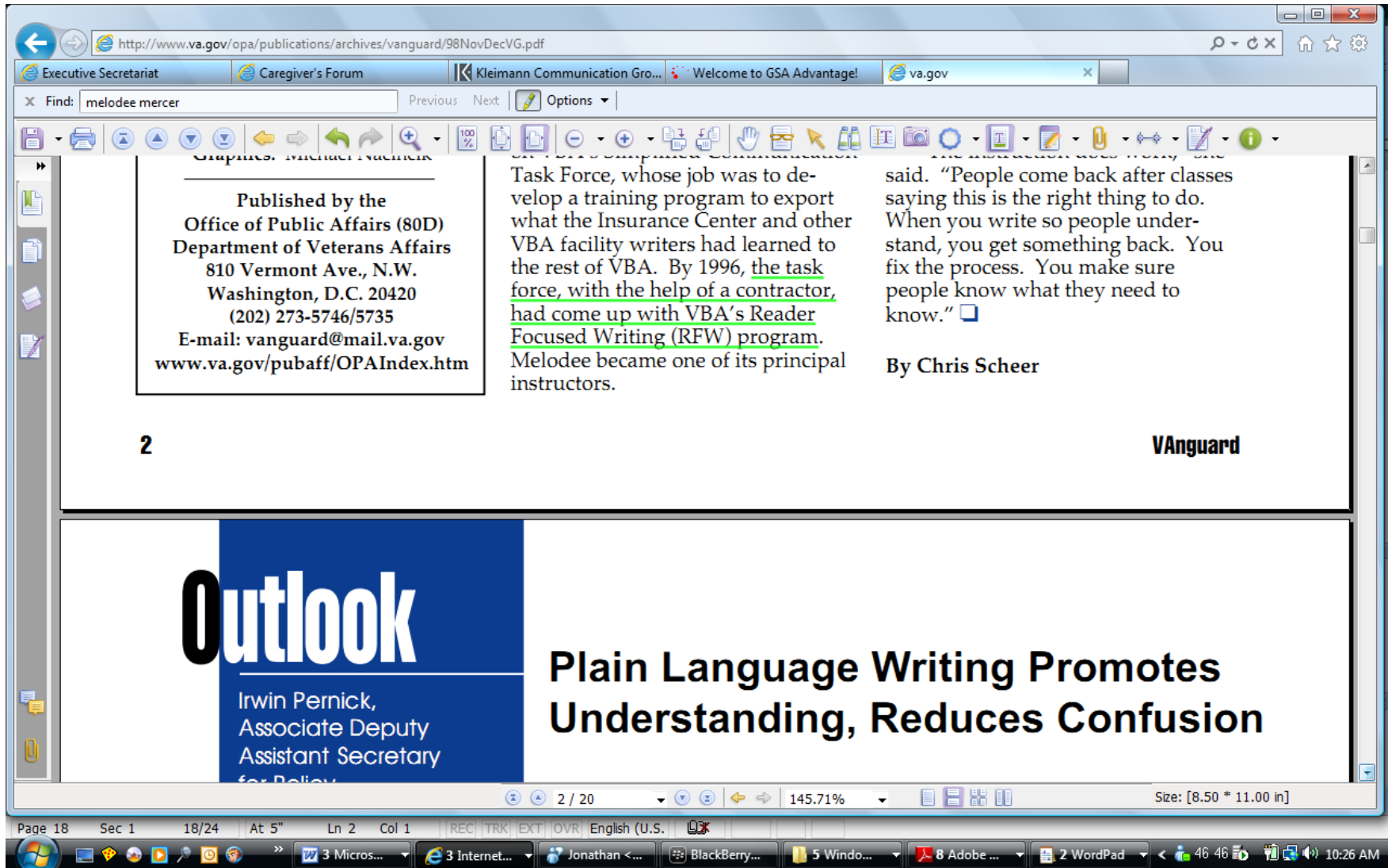
way in reinventing the way the government writes.  
In five years, Melodee has seen a local initiative she helped start develop into a national program. She is VBA's lead satellite RFW instructor; is a charter member of the NPR Plain English Network; and provides orientations for other agencies. Last year, she was detailed to NPR in Washington and wrote the "letter writing" guidance now on the NPR plain language web site at [www.plainlanguage.gov](http://www.plainlanguage.gov).  
The VA Plain Language Working Group, charged with implementing the President's directive throughout the Department, is working with Melodee and other VBA RFW experts to adapt that program for VA-wide use.  
"The instruction does work," she

2 / 20 145.71% Size: [8.50 \* 11.00 in]

Page 18 Sec 1 18/23 At 1" Ln 1 Col 2 REC TRK EXT OVR English (U.S.)

3 Micros... 3 Internet... Jonathan <... BlackBerry... 5 Windo... 8 Adobe ... 2 WordPad 47 47 10:03 AM

I do not know if the consultant who aided Mercer on this project was, in fact, Kleimann.



In Journal 50 on Clarity-international.net's website (<http://www.clarity-international.net/journals/50.pdf>), there appears an article (*Is Plain Language Appropriate for well-educated and politically important people?*) co-authored by Kleimann and her business partner, Barbra Enlow who received an award from NPR. Both Kleimann and Barbra Enlow benefitted from the Ross, Killefer, Cheek, Mercer, Killefer relationship.

of closure.

The letter mixes long, medium-length, and short sentences effectively, suggesting the rhythms of actual speech. (Only the 47-word sentence at the very middle of the letter might give some readers pause. However, braced as it is between two short clarifying sentences, it's not difficult to follow the line of thought.)

Nearly every sentence uses the active voice, so there is not the ambiguity common in public announcements about who is responsible for something that's happened.

The letter's rhetorical strategy achieves two objectives. The first is to account for her decision, ending after three sentences of explanation with the words, "This makes my position

## Is plain language appropriate for well-educated and politically important people?

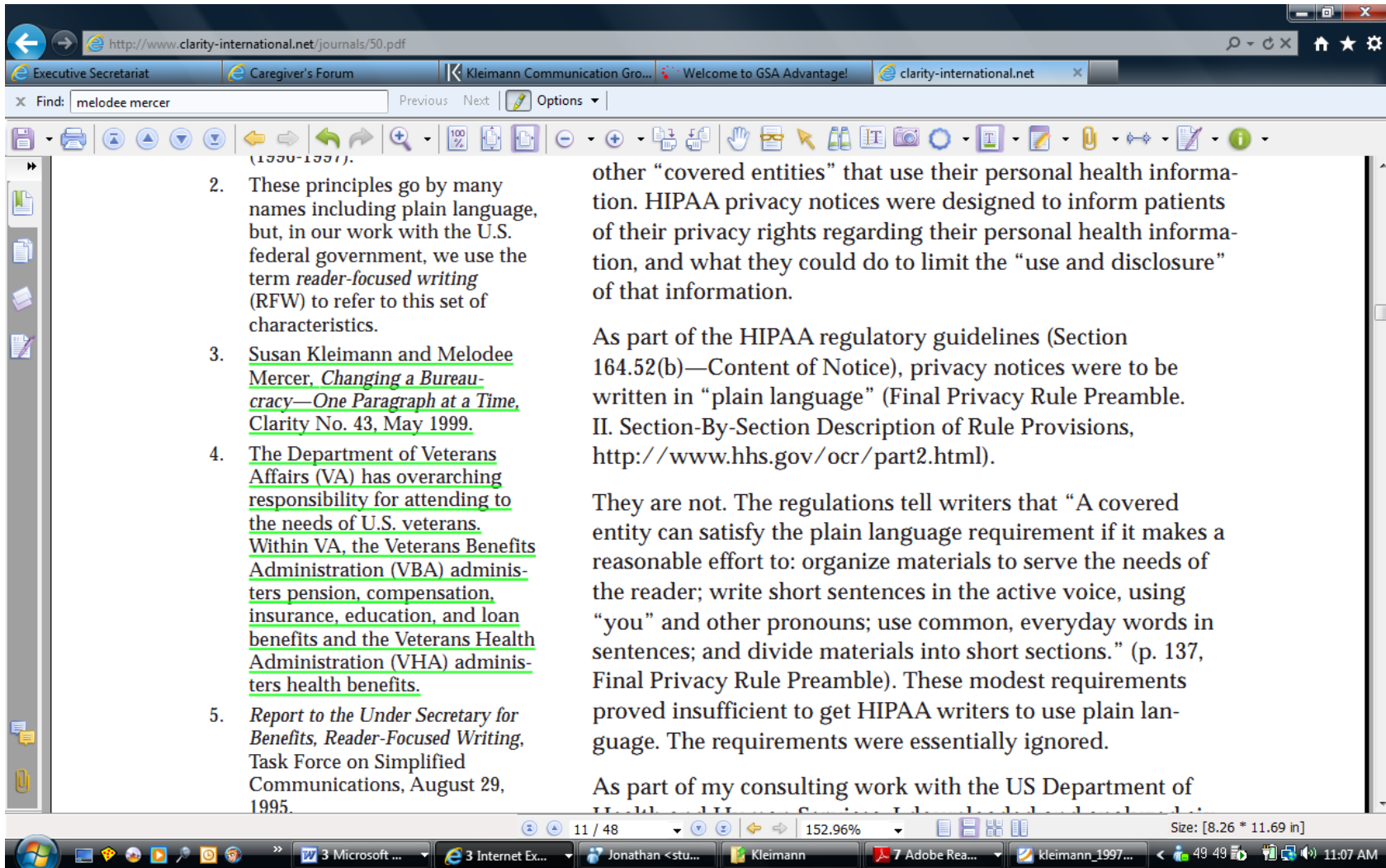
### Results of research with congressional correspondence

**Susan Kleimann & Barbra Enlow**  
*Kleimann Communication Group*  
*Washington, DC*

#### Introduction

Many researchers have supported the premise that clear, reader-focused communication increases reader comprehension and reduces the amount of time it takes for readers to understand what they need to do as a result of reading a document.<sup>1</sup> As consultants, however, we often find ourselves trying to persuade organizations of the importance of writing that employs principles such as putting the message up-front, identifying distinct audiences and tasks, using headings, employing appropriate

A footnote in this same publication also confirms that Kleimann and Mercer co-authored an article titled *Changing a Bureaucracy One Paragraph at a Time*.





### **About Susan Kleimann and Barbra Enlow—Kleimann Communications Group (KCG)**

As the above documentation reveals, Susan Kleimann and her partner, Barbra Enlow, were associated with NPR. Kleimann wrote articles on behalf of NPR (Rapport) and Barbra Enlow won an award from NPR. Kleimann and Enlow formed Kleimann Communications in November 1997—a few weeks after one of IRS's top officials awarded TWC the Notice Redesign Contract. Over the course of a year, TWC wrote over 116 notices and revamped almost 1000 penalty, interest and math-error codes in record time despite repeated schedule disruptions by Treasury to allow for the inclusion of NPR and other vendors in its writing and graphic redesign process. A binder TWC assembled contains documented proof of Treasury's repeated efforts to sabotage TWC's efforts. For example, IRS and Treasury documents—including a congressional report—credits NPR with TWC's rewrite and redesign innovations while drastically understating TWC's performance. On February 24, 1999, IRS terminated TWC's contract for convenience of the government. Soon after, IRS issued an RFQ for the exact same services. Two firms responded—TWC and another firm. IRS began discussions with TWC as a successful proposer. Without explanation, IRS terminated the RFQ and it disappeared from the landscape. TWC repeatedly asked IRS what had become of the IRS Notice Redesign contract via FOIA and other requests. Senators and Congressmen asked the same. But no one would reveal the status of the work. In 2008, TWC discovered informally that KCG was performing notice redesign effort.

Kleimann Communications' prior website reveals the firm began working on the notice redesign contract the year IRS terminated TWC's contract.

The screenshot shows a PDF viewer window titled "Kleimann\_IRS\_noticeredesign\_1999\_update.pdf - Foxit Reader". The page content is as follows:

// kleimann.communicate Page 1 of 1

who we are . our work . projects . plain language . clients . honors . beyond words . contact . careers . mobis

**KLEIMANN**  
COMMUNICATION GROUP, INC

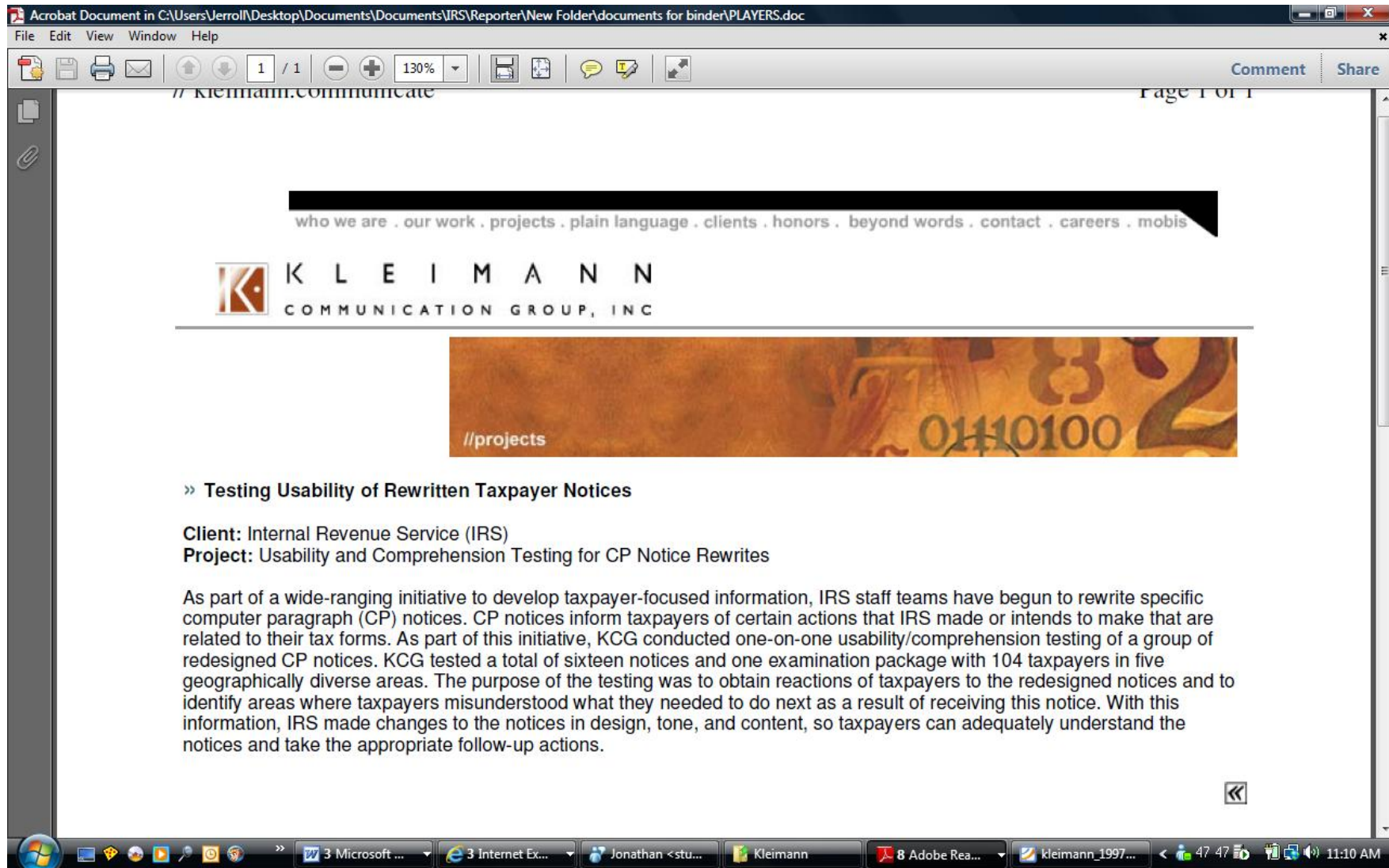
//projects

**» Developing Training to Redesign Taxpayer Notices**

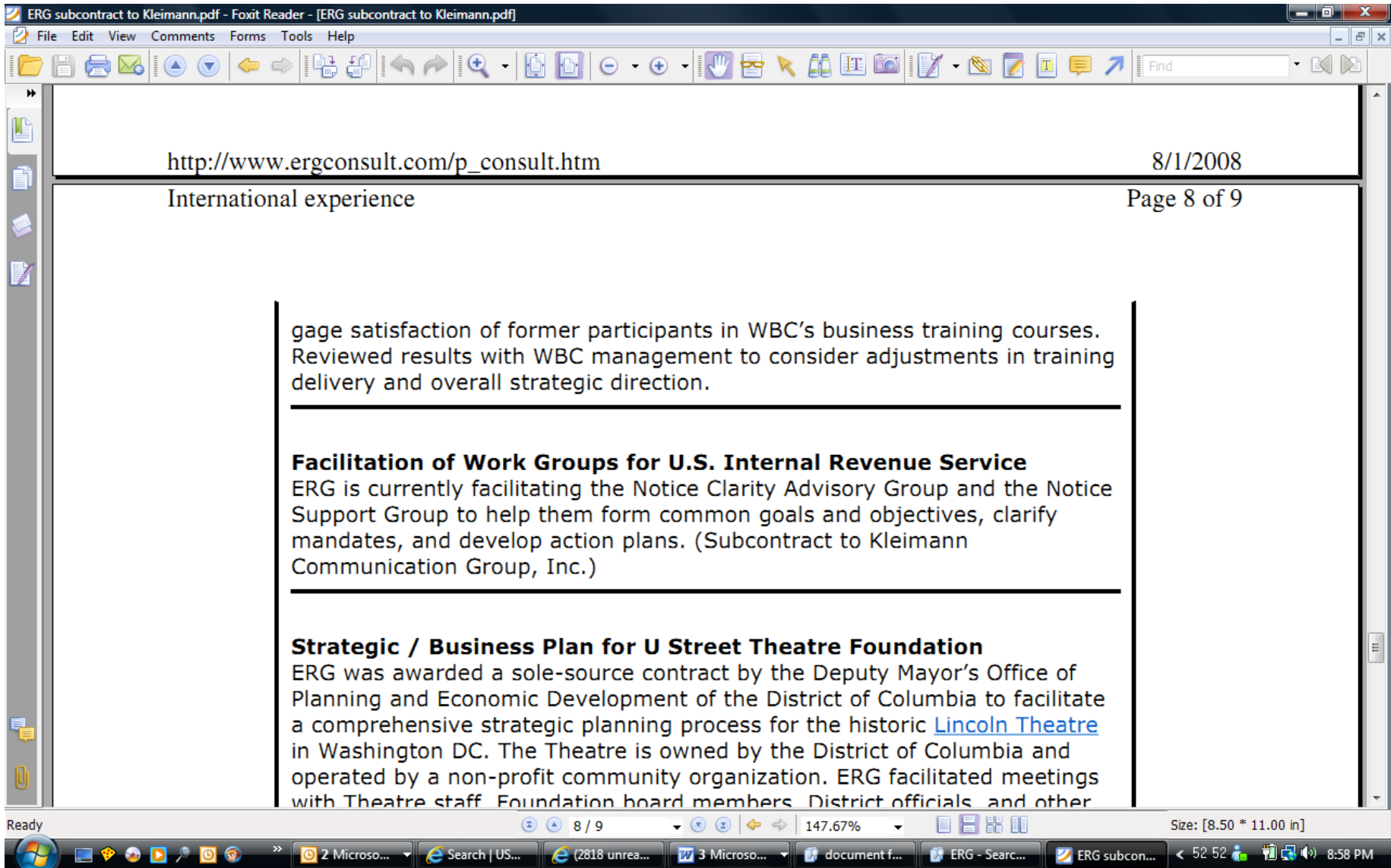
**Client:** Internal Revenue Service (IRS)  
**Project:** W&I Document Design Training

Since 1999, KCG has worked with IRS to launch its Notice Clarity initiative to rework and redesign taxpayer notices, and strategically implement this initiative within the Wage and Investment (W&I) Division. One major element of KCG's work has been to develop a series of workshops to train staff members in document design and build skills in creating clear and usable information. KCG's training has ranged from a survey course of document design theory to a skills-based workshop on specific tools and techniques to make documents with complex tax information easier for taxpayers to understand and use. Additionally, KCG has offered training to build skills for teams involved in the Notice Process Improvement Initiative. KCG's training has helped individuals and teams work more effectively towards IRS' end-goal of creating clear notices for taxpayers.

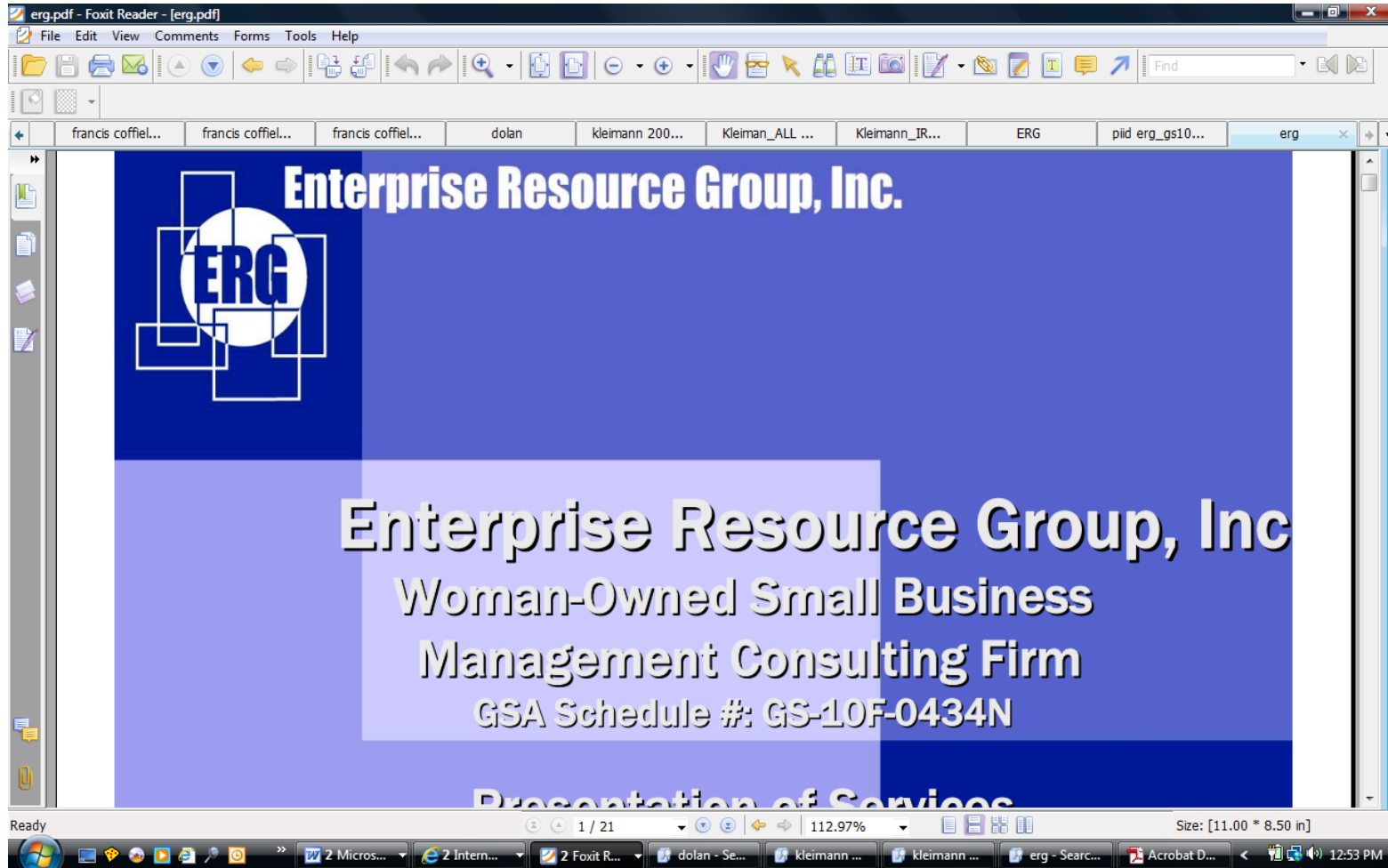
The following indicates KCG also had a contract to test the usability of the redesign notices. TWC's contract called for TWC to perform this same task before IRS terminated the contract.



The following indicates KCG performed notice redesign services as a subcontractor of ERG Consulting.



ERG was on the GSA Schedule, as evidenced by a page from ERG's former website. The firm has since changed hands. Because ERG was on the GSA Schedule, IRS and Treasury could award work to ERG without competition. ERG could then subcontract the work to Kleimann Communications Group (KCG).



Mercer, Cheek and Kleimann were all founding members/board members of the non-profit Center for Plain Language and they all were involved in NPR writing efforts.

## Susan Kleimann

The screenshot shows a Foxit Reader window displaying a PDF document titled "kleimann\_1997.pdf". The document content is as follows:

### Home

- Conference 2007
- Speakers
- Conference photos
- Conference programme
- Awards 2007
- Media links
- Past conferences and awards

## Dr Susan Kleimann

**President, Kleimann Communication Group (USA)**

Susan Kleimann, PhD, is one of the foremost leaders in the United States on clear communication in written documents. With over 30 years experience, Susan has also become an internationally recognised expert on the tangible benefits of plain English. She is a sought-after speaker on qualitative and quantitative research and evaluation, information design, instructional design, and organisational process analysis.

Since founding Kleimann Communication Group in 1997, Susan has led numerous research and document design projects to connect public or organisational policy with people in a meaningful way. She and her team have evaluated and redesigned many high-profile documents that have produced measurable results for both the organisation and consumers.

Some of Susan's many clients include the Internal Revenue Service, the Federal Trade Commission, and the Securities and Exchange Commission. Susan has testified before the Senate about the information needs of the elderly, won numerous awards for her work, and published many articles and books.

Susan served as the first Executive Director of the Center for Plain Language and as the second Director of the Document Design Center at the American Institutes for Research. She also received a prestigious fellowship from the US Government Accountability Office.

[▲ top](#)

[Home](#) [Conference 2007](#) [Awards 2007](#) [Past conferences and awards](#)

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Executive Secretariat | Caregiver's Forum | Kleimann Communication Gro... | Welcome to GSA Advantage! | Kleimann Communication ...

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X Find: Previous Next Options



### Our Core Team




**Susan Kleimann, Ph.D.**  
President

Since 1997, Susan Kleimann has led Kleimann Communication Group, a practice that integrates the design, development, and rigorous testing of consumer documents to ensure that consumers can use them to make informed decisions.

Before 1997, Dr. Kleimann served as Director of the Document Design Center at the American Institutes of Research and completed her dissertation as a Fellow at the U.S. Government Accountability Office on the review process for Blue Book reports. A founding member of the Center for Plain Language, she currently serves on its Executive Board and chairs its second annual ClearMark competition. She serves on the International Plain Language Working Group which is establishing international standards for plain language. She frequently speaks on the importance of rigorous consumer testing to audiences in the United States as well as the Netherlands, New Zealand, Canada, Australia, Portugal, and Mexico.


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**Barbra Kingsley, Ph.D.**

Barbra Kingsley, M.A., has over 15 years of experience in working with government agencies on communication projects designed to provide and elicit information from both employees and consumers. Ms. Kingsley has extensive knowledge in organizational development and process design to help organizations develop sustainable communication projects. A skilled group facilitator, Ms. Kingsley has led cross-functional groups in developing policy and creating strategic plans and processes. She has advised and coached numerous leaders as they implement strategic change, providing particular support in communicating change effectively to broad stakeholder groups. She is currently a Ph.D. candidate in Gonzaga University's Leadership Studies program, and her academic work focuses on helping leaders develop moral imagination in order to make better, more integrative decisions in organizational settings. She was recently awarded an internship with the United Nations to provide expertise in ethics and leadership at the United Nations Emergency Transit Centre in *Timișoara, Romania*.

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**Kristin Kleimann**

Kristin M. Kleimann has 16 years experience solving real world communication problems through information design, research, plain language, testing, and clear communication. Ms. Kleimann believes that one cannot simply change the content of written communications without also considering the design; and one cannot change the design of written communications without also considering the written content. She has worked with numerous government and private agencies to help them develop and design communication pieces that are clear and easy-to-use for the reader. Ms. Kleimann has served as a design/plain language consultant on large-scale redesign efforts. Ms. Kleimann is an accomplished speaker and has authored several articles, conference proceedings, and designed seminars and webinars.

Page 16 Sec 1 16/21 At 1" Ln 1 Col 2 REC TRK EXT OVR English (U.S.)

3 Mic... Kleiman... Jonatha... BlackBer... 5 Win... 6 Ado... Docume... melodee... 46 46 8:57 AM

# Melodee Mercer

http://www.linkedin.com/pub/melodee-merc...  
Melodee Mercer | LinkedIn

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## Melodee Mercer

Trainer, Field Producer, on-air talent at Department of Veterans Affairs  
Greater Philadelphia Area | Government Administration

Current	<ul style="list-style-type: none"><li>Trainer, Field Producer, On-Air talent, Focus Group Moderator at Department of Veterans Affairs</li></ul>
Past	<ul style="list-style-type: none"><li>Board at PLAIN &amp; Center for Plain Language</li><li>Focus Group Moderator at Dept Veterans Affairs</li><li>Staff at NPR</li></ul>
Education	<ul style="list-style-type: none"><li>RIVA Market Research</li><li>Temple University</li></ul>
Connections	10 connections
Websites	<ul style="list-style-type: none"><li>Personal Website</li></ul>

### Melodee Mercer's Summary

Bio supplied upon request

Specialties

- Collecting qualitative data (focus groups, document testing)
- Producing news packages and PSA (Script writing, interviewing)
- On-Air interviewer, actor, moderator, host

### Melodee Mercer's Experience

**Trainer, Field Producer, On-Air talent, Focus Group Moderator**  
**Department of Veterans Affairs**  
Government Agency, Government Administration Industry  
1990 – Present (21 years)

Many different communication jobs, including developing training, teaching, teaching plain language classes, field producer for VA News, On-air talent (host, moderator, trainer), and experience focus group moderator.

**Board**  
**PLAIN & Center for Plain Language**  
Government Administration Industry  
1990 – 2009 (19 years)

[Contact Melodee Mercer](#)

[Add Melodee Mercer to your network](#)

### View Melodee Mercer's full profile to...

- See who you and Melodee Mercer know in common
- Get introduced to Melodee Mercer
- Contact Melodee Mercer directly

[View Full Profile](#)

Not the Melodee Mercer you were looking for? [View more »](#)

### Name Search:

Search for people you know from over 100 million professionals already on LinkedIn.

First Name  Last Name

Example: [Melodee Mercer](#)

### Find a different Melodee Mercer:

**Melodee Mercer, Not relevant to this weblink at Not Given**  
Greater Philadelphia Area

[More professionals named Melodee Mercer »](#)

**The Ladders** Find \$100K+ jobs in your area

Manufacturing Manager \$160K Brand Director

3 Micr... 2 Inter... Jonatha... BlackBer... 5 Win... 6 Ado... Docume... melodee... 52 52 9:02 AM



producer for VA News, On-air talent (host, moderator, trainer), and experience focus group moderator.

---

**Board**  
**PLAIN & Center for Plain Language**  
 Government Administration Industry  
 1990 – 2009 (19 years)

---

**Focus Group Moderator**  
**Dept Veterans Affaris**  
 Government Administration Industry  
 1990 – 2009 (19 years)  
 Have moderated over 100 focus group for VA, FAA, IRS and other government agencies. Audiences include general public and high level officials.

---

**Staff**  
**NPR**  
 Government Administration Industry  
 1995 – 2000 (5 years)

---

Melodee Mercer's Education

**RIVA Market Research**  
 Focus Group Moderating and Report Writing  
 1991

---

**Temple University**  
 Music Education  
*Activities and Societies:* Started Temple's Alumni Band - a long time ago :-)

---

Melodee Mercer's Additional Information

Websites: **Personal Website**

---

Groups and Associations: **PLAIN, Center for Plain Language**

---

Honors and Awards: Communicators Awards of Excellence, US Distance Learning Association Government Instructor of the Year, National Association of Government Communicators Awards, Telly Award, Aurora, "No Gobbledygook" Award, Hammer Award

---

Melodee Mercer's Contact Settings

Interested In

**The Ladders** Find \$100K+ jobs in your area


Windows taskbar: 3 Mic..., 2 Inter..., Jonatha..., BlackBer..., 5 Win..., 6 Ado..., Docume..., melodee... 50 50 9:03 AM

C:\Users\Jerroll\Desktop Documents\irs investigation\Melodie Mercer\Melodee Mercer; WriteMark Conference and Awards 2006.mht

Tiger Woods, golf writer get in... Center for Plain Language | Pla... Plain Language: Improving Co... Melodee Mercer; WriteMark... X

File Edit View Favorites Tools Help

X Find: melodee Previous Next Options



**WRITE MARK**  
PLAIN ENGLISH STANDARD

New Zealand's plain English standard

What is the WriteMark?

What is plain English?

Plain English resources

How do you get a WriteMark?

Fees

Who's behind the WriteMark?

Who's got the WriteMark?

Plain English Network Trust

News

Contact us


WriteMark Conference and Awards


WriteMark Conference and Awards 2006

News and photos from 2006 conference

Presentations and workshops about plain English 2006

Details of 6 October 2006 conference






Melodee Mercer, MusB

Plain language instructor, Department of Veterans Affairs, USA

Melodee Mercer is a board member of the US-based Center for Plain Language and the Plain Language Action and Information Network. She was the Special Events Coordinator for the 2005 Plain Language Association International conference in Washington, DC. She has also moderated several plain language conferences. Melodee co-hosts an internet radio show featuring the Center for Plain Language.



Melodee is best known as Plain Language Instructor for the US Department of Veterans Affairs (VA). Melodee's award-winning satellite course, Reader-Focused Writing (RFW), has trained thousands of employees to write in plain language. Melodee has received many awards for her plain language work, including the IRS Deputy Commissioner's Award, the US Distance Learning Association's Outstanding Instructor in Government Award, and the International Communicator's Crystal Award of Excellence.

Melodee is co-author of the 1999 article, 'Changing a bureaucracy one paragraph at a time', which was published in *Clarity* and the *Michigan Bar Journal*. The article documents the process VA went through to build and maintain their plain language programme.

[List of speakers](#)

[Conference programme](#)

[Keynote addresses](#)

[Workshop details](#)

[▲ top](#)

Windows taskbar showing icons for Internet Explorer, Firefox, and other applications. System tray shows the time as 3:55 PM.

Document - WordPad

File Edit View Insert Format Help

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1 2 3 4 5 6 7

http://www.plainlanguagenetwork.org/conferences/2002/ip\_panel/us/8.htm

Sent - Yahoo! Mail killifer mercer cheek - Yahoo! S... Yahoo! Mail PNC Bank Online Banking Bryan Cave | Search for "phone... International Plenary Panel: ...

le Edit View Favorites Tools Help

Next, **IRS** – There are few things we dislike more than paying taxes - however, trying to figure how to fill out complicated, frequently indecipherable tax forms only makes it more painful. I'm happy to report that the folks at IRS are starting to recognize they need to be more customer-friendly. A few years ago, they began by having one of our leading Plain Language champions, Melodee Mercer of the Veterans Benefit Administration, work with them on a pilot project to do a major redesign of their official letters. IRS sends out about 110 million annually. The pilot project ended in last year and 7 new letters are out already. 13 more will issue next year.

The catalyst behind this improvement at IRS was outgoing Commissioner Charles Rossotti who was successful in achieving a major turn-around for this once-beleaguered agency because he re-organized it around taxpayers, not chapters of the tax code. This people-orientation was also evident in the more taxpayer-friendly PL notices that resulted from the pilot. Let's look at a notice called *We Want to Send you a Refund Check* "before & after" the pilot:

Our Plain Language representative from IRS describes the "Before" version as "intimidating and belligerent." Fortunately, even though Mr. Rossotti is leaving, many IRS decision-makers, including one of the four current Commissioners, are starting to get interested in Plain Language. So, I'm told it's safe to say IRS is at the beginning of a culture shift in accepting Plain Language.

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[Previous page](#) [Table of Contents](#) [Next page](#)

For Help, press F1


kevin's answers - Mi... STATEMENT OF JER... Document - WordPad Microsoft Office Pic... 8:34 AM

# Annetta Cheek

The screenshot shows a web browser window with the address bar displaying <http://www.usa.gov/webcontent/wmu/instructors/a-cheek.shtml>. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. A navigation bar at the top contains links for WEB CONTENT, SOCIAL MEDIA, CONTACT CENTERS, TECH SOLUTIONS, COMMUNITIES, and CUSTOMER SERVICE. The COMMUNITIES dropdown menu is open, showing options for Communities, Web and New Media, IT Managers and Specialists, and Contact Center Managers. On the left side, a vertical navigation menu lists items such as HOME, WMU, Schedule of Classes, Registration & Payment, Instructors, Media Talks, Conference, and Training. The main content area features a breadcrumb trail: Home » Web Manager University » WMU Instructors » Annetta Cheek. Below this is the section header "Bio: Annetta Cheek" in red text. A small portrait photo of Annetta Cheek is shown next to her biographical text. The text describes her as an anthropologist with a PhD from the University of Arizona in 1974, who worked for the U.S. federal government from 1980 until 2007. It highlights her focus on writing and implementing regulations, her interest in the Plain Language movement, and her role as chief plain language expert on Vice President Gore's National Partnership for Reinventing Government. It also mentions her chairmanship of the interagency plain language advocacy group, PLAIN, from 1995 until her retirement, and her administration of the group's website, [PlainLanguage.gov](http://PlainLanguage.gov). Further down, it notes her five-year tenure as Executive Assistant to the Administrator of the Federal Aviation Administration, her focus on plain language projects, and her service on the Web Council. She is also identified as a founding member of the Center for Plain Language, a federally tax-exempt corporation, where she serves as Chair of the board. Finally, it states she is the Director of Plain Language Programs for NOVAD Consulting and R3I Consulting, DC-area consulting firms. At the bottom of the page, there are two links: [View all Conference 2011 Speakers](#) and [View Conference 2011 Agenda](#). The browser's taskbar at the bottom shows several open applications, including Microsoft Word, Internet Explorer, and various other programs, along with the system clock showing 9:05 AM on 5/3/11.

[Home » Web Manager University » WMU Instructors » Annetta Cheek](#)

## Bio: Annetta Cheek



Dr. Annetta Cheek is an anthropologist by training, earning a PhD from the University of Arizona in 1974. Annetta worked for the U.S. federal government from 1980 until early 2007.

Most of Annetta's federal career focused on writing and implementing regulations. She became interested in the Plain Language movement in the early 90s. She spent four years as the chief plain language expert on Vice President Gore's National Partnership for Reinventing Government. She was the chair of the interagency plain language advocacy group, PLAIN, since it was founded in 1995 until she retired from the government, and administered the group's website, [PlainLanguage.gov](http://PlainLanguage.gov).

Annetta served for five years as an Executive Assistant to the Administrator of the Federal Aviation Administration, focusing on plain language projects and serving on the Web Council. A founding member of the Center for Plain Language, a federally tax-exempt corporation, she serves as Chair of the board. She is also the Director of Plain Language Programs for NOVAD Consulting and R3I Consulting, DC-area consulting firms.

[View all Conference 2011 Speakers](#)

[View Conference 2011 Agenda](#)



- Home
- Conference 2007
- Speakers
- Conference photos
- Conference programme
- Awards 2007
- Media links
- Past conferences and awards



## Dr Annetta Cheek

Chair, Center for Plain Language (Washington DC, USA)

A veteran leader in the plain language movement, Annetta Cheek, PhD, has spent many of her 25 years in federal government helping to make documents plain. Regulatory activities, especially writing and editing regulations, have occupied much of her career.



In 1994, Annetta became one of the first government employees to be involved in the federal plain language movement. In 1996 she moved to Vice President Gore's National Performance Review, where she was charged with spreading the plain language initiative across the federal government. She helped found the Plain Language Action and Information Network (PLAIN), a group of federal employees promoting plain language, and served as its chair until her retirement from the government in early 2007. She also developed PLAIN's website at [www.plainlanguage.gov](http://www.plainlanguage.gov).

In 2003, Annetta and several plain language colleagues founded the non-profit Center for Plain Language in Washington DC. Annetta currently serves as the Chair of the Center's board. In 2005 she received the Center's first award as an 'Outstanding Plain-Language Leader in Government'.

Annetta has helped organise plain language programmes in several different agencies and has trained hundreds of federal and private sector employees in plain language and writing for the web.

In 2006 Annetta testified before the House Government Reform Committee's Subcommittee on Regulatory Affairs in support of the Regulation in Plain Language Act (H.R. 4809). Her testimony supported what plain language and usability experts have long known: clear, concise, easy-to-understand regulations will save governments (and taxpayers) time and money.

[▲ top](#)

### Sponsors

We would like to thank the following sponsors for their support:



On the following page of the Executive Secretariat, National Institutes of Health website, Kleimann lists Cheek and Mercer as primary references.

http://execsec.od.nih.gov/index.html

Tiger Woods, golf writer get in... Center for Plain Language | Pla... Plain Language: Improving Co... Executive Secretariat

File Edit View Favorites Tools Help

X Find: melodee Previous Next Options

## Executive Secretariat

- NIH Staff Interaction with the Executive Secretariat
- Help with Writing Official Correspondence
- The Plain Language Initiative
- SERCH Replacement Project
- Reports & Meetings
- NIH Key Staff Lists
- About the Executive Secretariat

The NIH Executive Secretariat (ES) is located organizationally in the Immediate Office of the Director of the NIH. The Executive Secretariat manages the flow of information to and from, and the storage and retrieval of records concerning the activities of, the NIH Director and Deputy Director.

The Executive Secretariat is located physically in the Shannon Building (Building 1) on the Bethesda campus of the NIH. You can contact us at the following address, phone number, or fax number:

Executive Secretariat  
Office of the Director, National Institutes of Health  
Shannon Building (Building 1), Room B1-56  
1 Center Drive, NISG 0122  
Bethesda, Maryland 20892-0122  
phone: 301-496-1481  
fax: 301-496-6276

The ES promotes using plain language in all documents. Because part of the NIH mission is to reach all Americans with health information they can use, we try to communicate in a way that helps people to easily understand our research results.

[Contact Us](#) [Disclaimer](#) [Accessibility](#)

Kleimann lists Mercer and Cheek as primary references.

http://execsec.od.nih.gov/plainlang/training/private.html

Executive Secretariat

File Edit View Favorites Tools Help

Resource Center Training Resources Contractors/Consultants Ask a Consultant Proposal

## Private Contractors/Consultants

The cost associated with hiring a contractor/consultant varies with the specific needs of the organization requesting training and may be several thousand dollars. Cost depends on the breadth of training (e.g., customized packages vs. off-the-shelf packages). Cost is approximately \$100-\$110 per hour for consulting and \$1,350-\$1,700 per day for training. These two links are designed to help you find the right trainer for your group—[Questions You May Want to Ask a Consultant](#) and a [Sample Plain Language Training Proposal](#).

The following private contractors/consultants are among those offering customized Plain Language training to Federal agencies. These entities listed provided the accompanying descriptions. It is not an exhaustive list, and inclusion here does not indicate an endorsement by NIH of the contractor or the training described.

- EEI Communications - Richard Frank (301-495-2887 x202)**

Federal agencies served: Several—they have been assigned a BPA for training with NIH #263-54617, and they are on the GSA Schedule GSA-35F-0585K Rep ID = RFRA.

Note: Save 9% (using Government PO) to 14% (using Government Credit Card) off the catalogue price.

EEI Communications provides comprehensive and customized solutions to meet their client's needs and budgets.

Previous clients you may contact:

<b>Kimberly Morton</b> Army Printing Publications 703-428-0582	<b>Robert Van Rite</b> Drug Enforcement Agency 202-307-8168
--	---
- Kleimann Communications Group - Susan Kleimann, Ph.D. (202-737-5733)**

Federal agencies served: Department of Veterans Affairs, Internal Revenue Service, and National Partnership for Reinventing Government

Kleimann Communications is a woman-owned, small business with access to the GSA Schedule as a subcontractor. We synthesize the best plain language and information design techniques with their clients' imagination and objectives. We analyze, write, and design documents and forms with the reader as a focus. To extend their work, we have developed customized training for staff and managers, including usable regulations and correspondence. In addition, our organization can design training courses to address the specific needs of an organization.

Previous clients you may contact:

<b>Melodee Mercer</b> Insurance Adjuster Philadelphia Dept. of Veteran Affairs 215-842-2000, ext. 4267	<b>Annetta Cheek</b> Federal Aviation Administration (and formerly NPR Plain Language Coordinator) E-mail: <a href="mailto:acheek@patriot.net">acheek@patriot.net</a>
---	---

Taskbar: ILLEGALIT..., kevin's ans..., mercer an..., kleimann..., 7 Intern..., 2 Foxit R..., 7 Windo..., Acrobat D... 1:28 PM

Kleimann, Cheek and Mercer continue to serve on the Board of the Center for Plain Language where they were founding members. Cheek is the Board Chair at the Center for Plain Language:

The screenshot shows a web browser window displaying the 'Executive Board' page of the Center for Plain Language. The browser's address bar shows the URL 'http://centerforplainlanguage.org/about/executive-board/'. The website header includes the logo 'Center for Plain Language' and the slogan 'Plain language is a civil right'. A navigation menu contains links for Home, Plain Language Blog, Events, Awards, Resources, About Us, and Get Involved. The main content area is titled 'Executive Board' and includes a sub-header 'About the Center'. The text states: 'The Center for Plain Language is run by an elected executive board.' Below this, a section titled 'Board Members' lists the following individuals: Annetta Cheek, Chair; Susan Kleimann, Vice-Chair; Julie Clement, Treasurer; Kate Walsler, Recording Secretary; Amy Bunk, Corporate Secretary (Records Keeper); Deborah Bosley (editor, Plain Language Matters); Heather Holland; Joanne Locke; Melodee Mercer; Whitney Quesenbery; Stacey Robinson; Karen Schriver; and John Spotila. The Executive Director is identified as Henry Maury. A note mentions that members serve for 3 years and elections are held each spring. A 'Former Board Members' section lists: Ginny Redish (2003-2006 and 2008-2011); Joe Kimble (2003-2011); Irene Eitzkorn (2008-2011); Dana Botka (2007-2010); and Shea Antrim (2009-2010). The right sidebar contains links for 'About the Center', 'Contact Us', 'Executive Board', and 'Twitter @plain\_language'. It also features a 'Connect with Plain Language' section with links to 'Join the Center', 'Read the Blog', 'Become a Sponsor', and 'Subscribe to our Blog RSS', along with social media icons for Twitter, Facebook, and YouTube. The Windows taskbar at the bottom shows several open applications, including 'Plain+ writin...', 'additional do...', 'Executive Bo...', 'Kleimann\_IRS...', '3 Windows ...', '2 Microsoft...', and 'Document - ...'. The system clock indicates the time is 3:12 PM.



Kleimann is former chair of the Board at the Center for Plain Language:

The screenshot shows a web browser window with the address bar displaying <http://centerforplainlanguage.org/about/executive-board/>. The browser has two tabs: "Executive Secretariat" and "Executive Board | Center for...". The page content includes:

**Executive Director:** Henry Maury

Members serve for 3 years. Elections are held each spring. If you are interested in running for the board, please contact the Executive Director.

**Former Board Members**

- Ginny Redish (2003-2006 and 2008-2011)
- Joe Kimble (2003-2011)
- Irene Etzkorn (2008-2011)
- Dana Botka (2007-2010)
- Shea Antrim (2009-2010)
- Bill Smith (2006-2009)
- Lee Johns (2006-2008)
- Bill Lutz (2004-2007)
- Greg Hosmer (2004-2006)
- John Strylowski (2003-2005)

**Former Executive Directors**

- Don Byrne 2007-2011
- Thom Haller 2006-2007
- Susan Kleimann 2003 – 2006

At the bottom of the page, there is a navigation menu: Home | Plain Language Matters | Resources | Events | About the Center | Get Involved. Below that is contact information: Contact Us | 3315 Longwood Drive, Falls Church, VA 22041 +1 301-219-1731 | centerforplainlanguage@gmail.com. The footer also mentions "Site design by Johnathan Andersen Design, Inc.. Online Forms by Wufoo".

The Windows taskbar at the bottom shows several open applications: ILLEGALIT..., kevins ans..., mercer an..., kleimann..., e7 Intern..., 2 Foxit R..., 7 Windo..., and Acrobat D... The system clock shows 1:31 PM.

Kleimann and Cheek and Mercer and Kleimann acted in concert when writing articles and during speaking engagements as evidenced by the following government website.

The screenshot shows a web browser window with the URL [http://www.plainlanguage.gov/search/index.cfm?q=kleimann&btnG=Search&ie=&site=DOT\\_Pages&output=xml\\_no\\_dtd&client=DOT\\_Pages&lr=&proxystylesheet=DOT\\_Pages&oe=](http://www.plainlanguage.gov/search/index.cfm?q=kleimann&btnG=Search&ie=&site=DOT_Pages&output=xml_no_dtd&client=DOT_Pages&lr=&proxystylesheet=DOT_Pages&oe=). The browser tabs include "Center for Plain Language | Pla...", "Search Results", and "Executive Secretariat". The search bar contains "melodee" and the search results page shows "kleimann" entered in the search box. The website header features the logo "Plain Language.gov" with the tagline "Improving Communication from the Federal Government to the Public". A navigation menu includes links for Home, PL Law, PL Guidelines, Examples, Examples DB, Tips & Tools, Popular Topics, Resources, PL Websites, and PL Legacy. The search results for "kleimann" are displayed, showing 4 results. The first result is a news article titled "Plain Language Events" with a snippet: "... Annetta Cheek and Susan Kleimann will be discussing their work with the Group on a plain language definition and plain language standards ... | 50k". The second result is "Revisiting Plain Language - Beth Mazur" with a snippet: "... American Institutes for Research are no longer in operation, but their principals, Karen Schriver, Ginny Redish, and Susan Kleimann, continue to be ... | 59k". The third result is "Plain Language: beyond a 'movement'" with a snippet: "... (42) DR SUSAN KLEIMANN AND MELODEE MERCER Changing a Bureaucracy—One Paragraph at a Time CLARITY No. 43, at 26 (May 1999). ... | 114k". The search results are sorted by date and relevance. The browser's taskbar at the bottom shows several open applications, including "erg consulting - ...", "Search Results - ...", "2 Windows Ex...", "3 Microsoft Of...", "Document - Wor...", and "16 Microsoft O...". The system clock shows 7:10 AM.

Kleimann, Mercer, Cheek relationships benefitted the group greatly financially in the form of past performance, speaking engagements, contracts, and helped establish them as writing experts. The following is an award Kleimann received for tax instruction:

Kleimann award for tax instruction.pdf - Foxit Reader - [Kleimann award for tax instruction.pdf]

File Edit View Comments Forms Tools Help

directive\_EP\_MACRO\_ focus gr... take\_TWCS\_focus\_groups omb\_focus groups Kleimann award for tax instruction x

Front Page | Arts | Business | Education | Environment | Government | Industry | Lifestyle | Sports | Tech | Other

Monday, February 27, 2012

RSS | E-mail Newsletters | Put PRWeb on your site

### Kleimann Communication Group Honored with Award for International Best of Show Technical Communication

Kleimann Communication Group, an international leader in bringing clear communication to organizations, is proud to announce their win of the Best of Show Distinguished Technical Communication award at the Society for Technical Communication (STC) International Technical Publications competition.

Denver, Colo. (PRWEB) May 15, 2009

Email PDF Print

Kleimann Communication Group, an international leader in bringing clear communication to organizations, is proud to announce their win of the Best of Show Distinguished Technical Communication award at the Society for Technical Communication (STC) International Technical Publications competition. The award, for the report titled Putting Theory into Practice: A Best Practices Approach to Developing Tax Instructions, was presented to Kleimann at the 54th Annual Technical Communication Summit in Atlanta, Georgia.

The award-winning report documented best practices in tax instruction booklets by examining the relevant literature as well as assessing State and international tax instructions. The report provided the Internal Revenue Service with a set of guiding principles and standards for developing tax instructions based on the integration of visual and written communication.

"Kleimann is honored to have our work recognized by STC. We live in a complex world, work in complex organizations, and live complex lives. It's no wonder our communication is complicated and dense," said Susan Kleimann, President of Kleimann Communication Group. "For more than a decade we have been working with government agencies and private industry to make complex information clear. With the need for consumer protection, transparency, and plain language being the focus of recent media attention, Kleimann is delighted that our work in these areas has been acknowledged."

About Kleimann Communication Group  
Kleimann Communication Group is a woman-owned, small business with offices in Denver, CO and Washington, DC. Founded in 1997, Kleimann believes that clear communication is a basic right that breaks down barriers and allows true understanding to occur. The company makes complex information clear and works with the information that keeps business and the world moving: instructions, forms, applications, mortgage disclosures, and privacy notices.

###

#### Contact

Kristin Kleimann  
Kleimann Communication Group, Inc.  
303 477 3963  
Email

#### Attachments

Press Release Attachment  
Theory into Practice Cover

Ready 1 / 2 146.2% Size: [8.50 \* 11.00 in]

3 Microsoft... Document -... Microsoft O... focus group... kleimann - S... Kleimann a... Internet Expl... 8:48 AM

Kleimann cites IRS notice redesign as past performance on its website.

The screenshot shows a web browser window displaying the Kleimann website. The browser's address bar shows the URL <http://www.kleimann.com/work.html>. The website header features the Kleimann logo with the tagline "simplicity | clarity | illumination". A navigation menu includes links for Home, Our Work, Our Approach, Our Team, Our Blog, Our Press, and Contact Us, along with a search bar. The main content area is titled "Our Work" and contains a list of projects: Model Financial Privacy Notice, Good Faith Estimate, IRS Tax Forms and Notices, and Plain Language Writing Training. A large image of a glowing lightbulb is centered on the page. To the right of the lightbulb, a "More Info" section lists "Our Clients" and "Our plain language training courses (PDF)". Below the lightbulb image, a paragraph states: "A woman-owned small business, we specialize in integrating research, design, and testing to create consumer-centered communications that work for you and for your consumers." The footer of the website includes the copyright notice: "Copyright ©2010 Kleimann Communication Group. All rights reserved." The Windows taskbar at the bottom shows several open applications, including "ILLEGALITIES - Micr...", "mercier and cheek a...", "kevins answers - Mi...", "Executive Secretariat...", and "Kleimann Communi...". The system clock indicates the time is 3:09 PM.

kleimann  
simplicity | clarity | illumination

Home Our Work Our Approach Our Team Our Blog Our Press Contact Us

Our Work

- [Model Financial Privacy Notice](#)
- [Good Faith Estimate](#)
- [IRS Tax Forms and Notices](#)
- [Plain Language Writing Training](#)

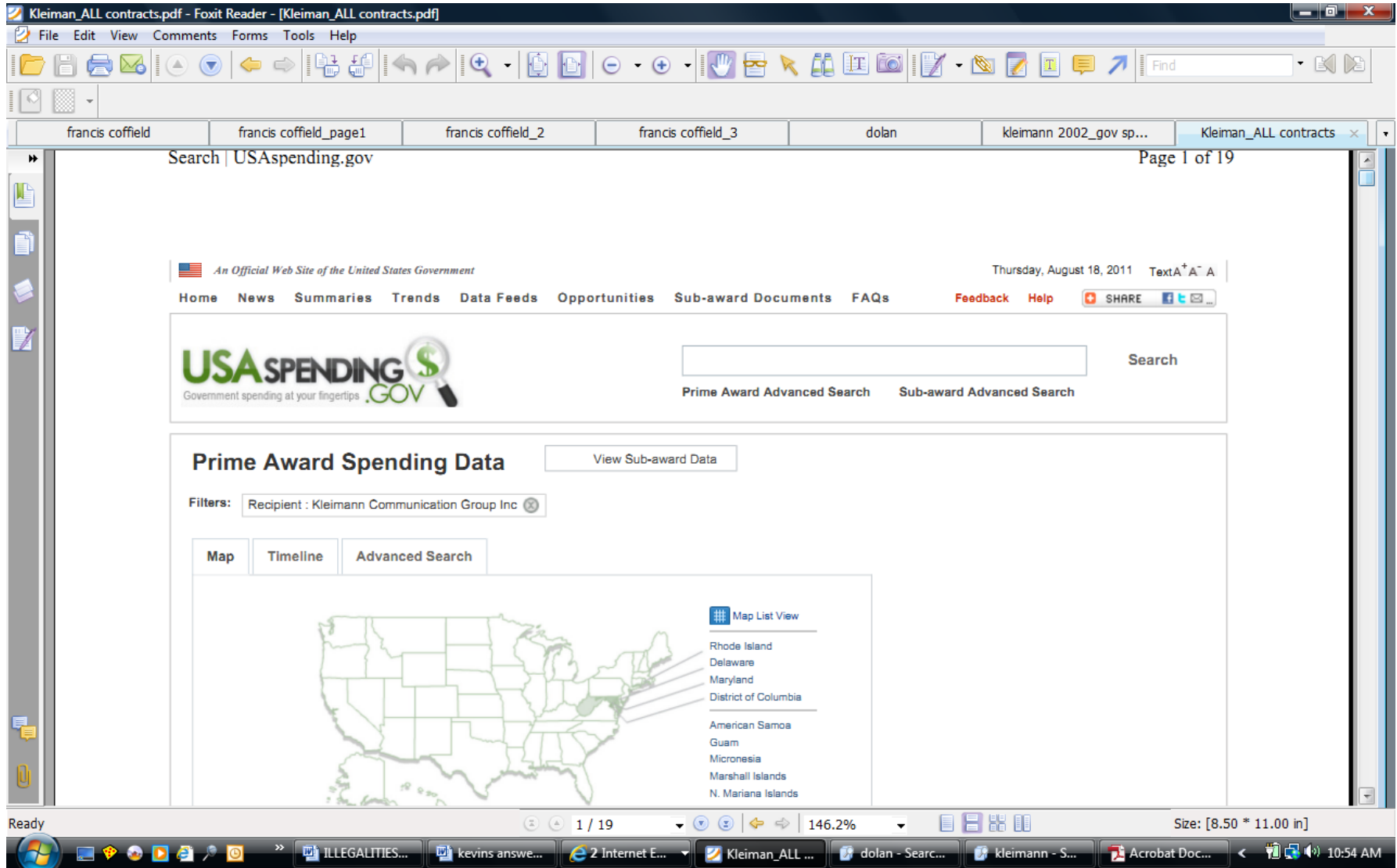
More Info

- [Our Clients](#)
- Contracting With Us - Please contact [Sue Trybula](#) for more information
  - [GSA MOBIS Schedule](#)
  - BOA with Federal Reserve Board
  - Preferred vendor with Fannie Mae
- [Our plain language training courses \(PDF\)](#)

A woman-owned small business, we specialize in integrating research, design, and testing to create consumer-centered communications that work for you and for your consumers.

Copyright ©2010 Kleimann Communication Group. All rights reserved.

Kleimann and Enlow benefitted substantially, financially, from their relationship with Mercer and Cheek:



Kleiman\_ALL contracts.pdf - Foxit Reader - [Kleiman\_ALL contracts.pdf]

File Edit View Comments Forms Tools Help

francis coffield francis coffield\_page1 francis coffield\_2 francis coffield\_3 dolan kleimann 2002\_gov sp... Kleiman\_ALL contracts

1

Total Dollars: <b>\$6,371,424</b>	Transactions: <b>1 - 90 of 90</b>
--------------------------------------	--------------------------------------

Transaction Number # 1  
IDV PIID : PIID **GS10F0521P : HHSP233200800301G: 3** (Delivery Order)

Recipient: **KLEIMANN COMMUNICATION GROUP INC** Date Signed: **March 12 , 2009**  
1321 RHODE ISLAND AVE NW , WASHINGTON, DISTRICT OF COLUMBIA

Reason for Modification: Supplemental Agreement for work within scope Obligation Amount: **\$603,883**

Program Source: 75-4552:HHS Service and Supply Fund

Agency: Department of Health and Human Services : Office of Asst. Sec. for Health except national centers (disused code)

Product/Service Code: **R699 : Other Administrative Support Services**

Description: INACTIVE SOURCE BUYER: CHRIS GANEY  
SOURCE CO: CHRIS GANEY

Transaction Number # 2  
PIID: **HUDCCOPC22833** (Definitive Contract)

Recipient: **KLEIMANN COMMUNICATION GROUP INC** Date Signed: **September 30 , 2005**  
1321 RHODE ISLAND AVE NW , WASHINGTON, DISTRICT OF COLUMBIA

Reason for Modification: Obligation Amount: **\$441,328**

Program Source: Department of Housing and Urban Development : HOUSING AND URBAN DEVELOPMENT Department of

Product/Service Code: **R405 : Operations Research and Quantitative Analysis Services**

Ready 1 / 19 Kleiman\_ALL contracts.pdf - Foxit Reader - [Kleiman\_ALL contracts.pdf] Size: [8.50 \* 11.00 in]

ILLEGALITIES... kevins answe... 2 Internet E... Kleiman\_ALL ... dolan - Searc... kleimann - S... Acrobat Doc... 10:55 AM

Kleiman\_ALL contracts.pdf - Foxit Reader - [Kleiman\_ALL contracts.pdf]

File Edit View Comments Forms Tools Help

francis coffield francis coffield\_page1 francis coffield\_2 francis coffield\_3 dolan kleimann 2002\_gov sp... Kleiman\_ALL contracts

Description: RESPA Forms Development and Testing

---

Transaction Number # 3  
 IDV PIID : PIID **GS10F0521P : TIRNO08Z000020015** (Delivery Order)

Recipient: **KLEIMANN COMMUNICATION GROUP INC** Date Signed: June 10 , 2008  
 1321 RHODE ISLAND AVE NW , WASHINGTON, DISTRICT OF COLUMBIA

Reason for Modification: Obligation Amount: \$426,741  
 Program Source:

Agency: Department of the Treasury : Internal Revenue Service  
 Product/Service Code: R408 : Program Management/Support Services  
 Description: Notice Insert Effectiveness Project

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Transaction Number # 4  
 IDV PIID : PIID **GS10F0521P : TIRNO08Z000020020** (Delivery Order)

Recipient: **KLEIMANN COMMUNICATION GROUP INC** Date Signed: September 09 , 2008  
 1321 RHODE ISLAND AVE NW , WASHINGTON, DISTRICT OF COLUMBIA

Reason for Modification: Obligation Amount: \$366,893  
 Program Source:

Agency: Department of the Treasury : Internal Revenue Service  
 Product/Service Code: R408 : Program Management/Support Services  
 Description: 1040X Focus Group & Redesign

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Transaction Number # 5

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With Mercer and Cheek's help, Kleimann positioned herself as one of the government's leading consultants on plain language.

Center for Plain Language | Plain Language | Revisiting Plain Language - ... x Executive Secretariat

File Edit View Favorites Tools Help

x Find: kleimann Previous Next Options 1 match

**Plain language is about inviolate rules.**

The last criticism I'll address is the rules versus guidelines issue. With the exception of some older plain language resources such as Flesch (1979) and Mellinkoff (1982), many plain language proponents point out that guidelines are not rules; their observance requires judgment:

- "I say guidelines, not rules" (Cutts 1995, p. 2).
- "Don't make Plain Language guidelines into rules" (Baldwin 1999, p. 19).
- "As with all the advice in this handbook, feel free to tailor these tips to your schedule, your document, and your budget. . . . Pick and choose the ones that work for you." (SEC 1998).

Redish and Rosen provide an interesting discussion on guidelines. First, they begin with a definition: "A guideline is a suggestion that helps writers achieve the goal of communicating clearly with their readers." They also note that "guidelines are a necessary part of any heuristic" and argue that many writers have essentially internalized guidelines that are used as they write.

The authors interviewed 30 people to find out whether they used guidelines in their writing. Those who were professional writers said that they did not use guidelines at this stage in their career (although many had used them earlier). Those who were recent graduates of technical writing programs had "mixed feelings" about guidelines. Some thought they were useful reminders, while others thought this was information they had already learned in school. The last group consisted of professionals in fields other than writing. For this group, 9 of 10 "reported that they rely on guidelines in their writing" (Redish and Rosen 1991).

The important point here is that guidelines are useful tools for those who write as a secondary activity rather than as their primary profession. And this is exactly the audience for whom plain-language guidelines are usually written.

[TOP](#)

**CONCLUSION**

Plain language today has been and is being informed by the work of information and document designers. Of the resources I reviewed, I would recommend the SEC's *Plain English handbook*, Asprey's *Plain language for lawyers*, and Cutts' *Plain English guide* as worthwhile resources (*Guidelines for document designers* is no longer in print). Baldwin's *Plain language and the document revolution* also deserves a look. It takes plain language to a new playing field, some of which is intriguing and some of which is curious. For example, although it provides a lengthy discussion of information displays that hold considerable promise for future documents, it lacks all but a cursory discussion of actual usability testing.

Today's plain language proponents clearly need more contributions from the academic and research organizations that provided much of its foundation. Both the Communications Design Center at Carnegie Mellon University and the Information Design Center (and its predecessor, the Document Design Center) at the American Institutes for Research are no longer in operation, but their principals, Karen Schriver, Ginny Redish, and Susan Kleimann, continue to be very active in both information design and plain language.

What is necessary for plain language to succeed? Redish (1985, p. 136) suggests that we need to:

- Increase awareness of the problems that traditional documents cause.
- Understand what causes the problems.
- Develop ways to solve the problems.
- Apply the solutions.
- Teach others how to apply the solutions.

erg consulting - ... Revisiting Plain ... 2 Windows Ex... 3 Microsoft Of... Document - Wor... 16 Microsoft O...



IRS Notice Redesign positioned Kleimann for other Treasury contracts.

The screenshot shows a web browser window displaying the website of the Office of the Comptroller of the Currency. The address bar shows the URL: <http://www.occ.gov/news-issuances/news-releases/2006/nr-ia-2006-42.html>. The browser has several tabs open, including "About PLAIN", "Kleimann Communication Gro...", and "OCC: Report Issued on Impr...". The search bar contains the text "kleimann" and shows "1 match".

The website header includes the OCC logo and the text: "Comptroller of the Currency, Administrator of National Banks, US Department of the Treasury". The main heading is "Office of the Comptroller of the Currency" with the tagline "Ensuring a Safe and Sound National Banking System for all Americans." There is a "Site Map" link and a "Text Size" selector (S M L).

The navigation menu includes: Home, About the OCC, News and Issuances, Publications, Tools and Forms, Topics. The breadcrumb trail is: Home > News and Issuances > News Releases > 2006.

On the left, there is a "News and Issuances" sidebar with a "News Releases" section listing years from 2012 to 1995. The year 2006 is highlighted with a blue arrow.

The main content area is titled "Joint Release" and "Board of Governors of the Federal Reserve System, Federal Deposit Insurance Corporation, Federal Trade Commission, National Credit Union Administration, Office of the Comptroller of the Currency, Office of Thrift Supervision, Securities and Exchange Commission". The release is identified as "NR 2006-42 FOR IMMEDIATE RELEASE March 31, 2006".

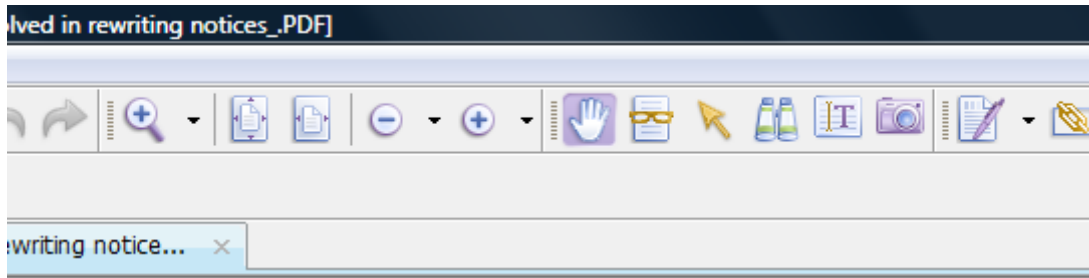
The title of the release is "Report Issued on Improving Financial Privacy Notices for Consumers". The text of the release begins: "WASHINGTON, D.C. – Federal regulators today released *Evolution of a Prototype Financial Privacy Notice*, a report by [Kleimann](#) Communication Group summarizing consumer research commissioned by the regulators as part of their ongoing efforts to develop improved financial privacy notices." It continues to describe the report's findings and the interagency project.

On the right side, there is a "Search News and Issuances" section with a search box and a "Search" button. Below it is a "Browse by:" section with dropdown menus for "Select a Type..." and "Select a Year...", and "Submit" and "Reset" buttons. There is also a link to "Search Office of Thrift Supervision (OTS) Archive".

At the bottom right, there are sections for "Media Contacts" (with phone number (202) 874-5770 and a link to "Media Press Room") and "Stay Updated" (with links for "OCC News Feeds" and "OCC News E-mail List" with a "Subscribe" button).

The Windows taskbar at the bottom shows several open applications, including "ILLEGALIT...", "kevins ans...", "mercier an...", "kleimann...", "6 Intern...", "2 Foxit R...", "7 Windo...", and "Acrobat D...". The system clock shows 1:20 PM.

NPR claimed credit for TWC's work in the *2010 Taxpayer Advocate Report*—Pages 12 and 13. The innovations referenced were introduced by TWC, as confirmed by TWC's final report issued in August 1999 when completed notices were delivered. TWC actually revamped 116 notices, not six.



MOST SERIOUS PROBLEMS

#### Product Improvements: Notices

- Began testing of six redesigned notices.
- Revised notices to taxpayers to add a paragraph on appeal rights.
- Redesigned Return Delinquency notices to make them more understandable.
- Added "Frequently Asked Questions" section to "Notices Page" on the Web.
- Rewrote the Understanding Your Notice section of the public web site in plain language. This section explains why the taxpayer received a particular notice, what it means, and what the taxpayer should do next.

#### Training

- Implemented the National Partnership for Reinventing Government and the Vice President's Plain Language Team's Reader Focused Writing approach for rewriting IRS notices.
- Trained employees in listening, speaking and writing skills.
- Trained both national office and field employees in letter writing techniques. These individuals will act as resource and reference persons to ensure all correspondence meets Service guidelines.
- Established a Taxpayer Correspondence and Notice Improvement Intranet Web page to provide employees with access to writing and plain language tools.

#### FISCAL YEAR 2001 PLANS:

- Redesign 11 more notices.
- Adapt the Reader Focused Writing techniques and the Collaborative Writing process used by the Veterans Benefit Administration (VBA), with the help of the National Partnership for Reinventing Government (NPR).
- Continue to eliminate notices where appropriate.
- Institute on-line notice review and correction capability in order to detect and correct sooner any errors on notices.



**LONG-RANGE PLANS:**

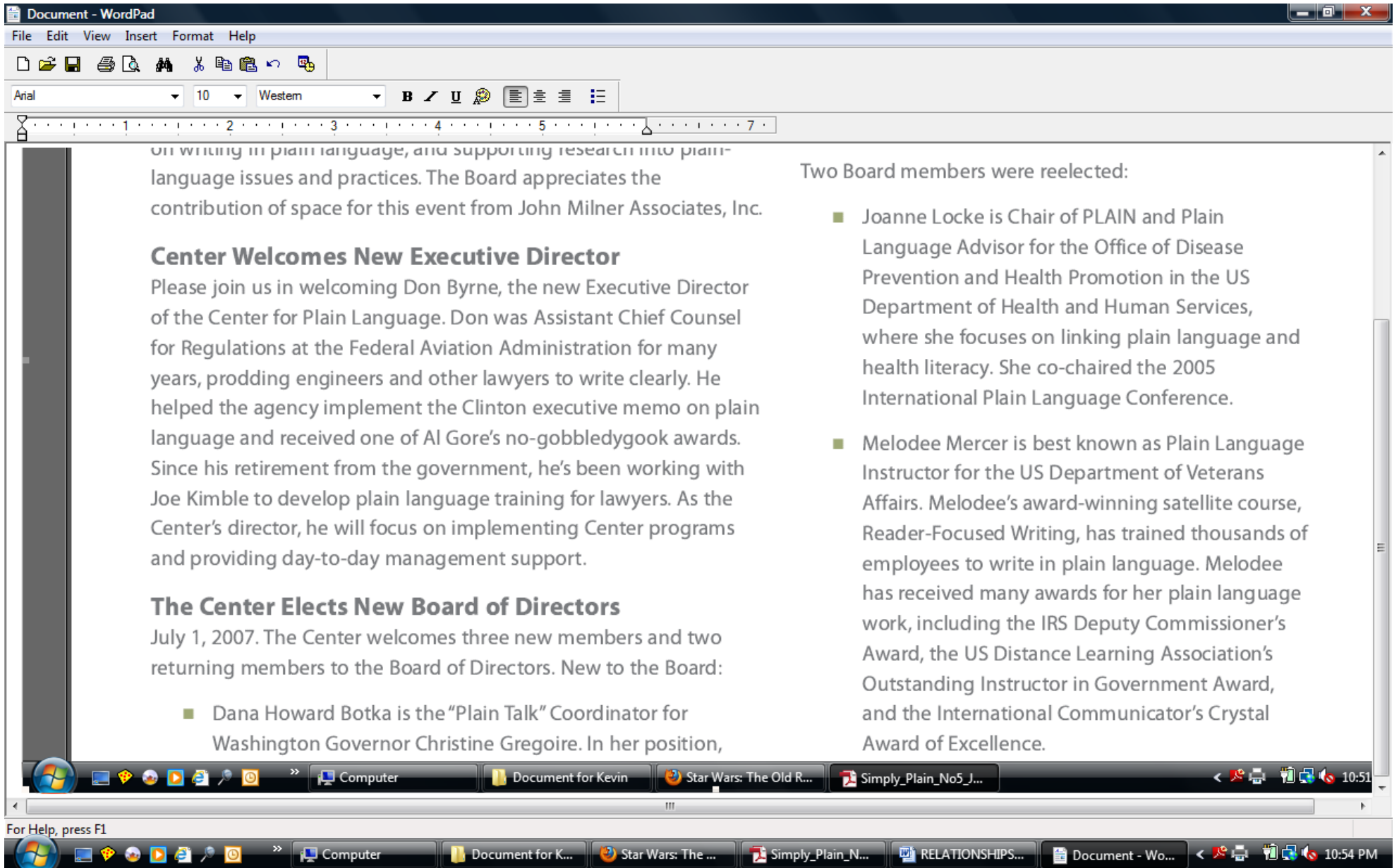
- Continue to redesign the remaining notices.
- Begin working on the hundreds of pre-printed and computer generated letters that currently exist with ultimate goal to rewrite and redesign all correspondence.
- Ensure Customer Service Representatives will be able to view the taxpayer's notice on-line when the taxpayer inquires. We are migrating the Notice Viewing Project to the Integrated Case Processing (ICP) platform, to integrate this application with the other tools used by Customer Service Representatives.
- Decrease the number of incorrect notices sent to taxpayers by shortening the account update cycle.
- Speed up the issuance of notices and incorporate all processing issues into one notice.

**Taxpayer Advocate Service Comments**

*Written communication is a problem that we expect will remain near the top of the list for several more years. Comments from some members of the practitioner community express an appreciation for the improvements to computer-generated correspondence. However, little progress has been made in the redesign of notices. Only six notices have been revised, 11 are scheduled to be revamped this year, while the redesign of the remaining notices has been relegated to Long Range Plans. A problem of this magnitude deserves more attention than it is getting. For millions of taxpayers the only contact they have with IRS is a notice or letter. This correspondence should be clear, to the point and not leave them confused and frustrated.*

*We realize this effort is hampered by the complexity of tax law, the legislated requirements to include certain information in correspondence, and information systems limitations. But, we know from the volume of calls received from perplexed taxpayers, it is time for IRS to make the commitment and dedicate the resources necessary to improve its written communications.*

## Mercer was awarded the IRS Deputy Commissioner's Award for work on IRS documents



on writing in plain language, and supporting research into plain-language issues and practices. The Board appreciates the contribution of space for this event from John Milner Associates, Inc.

### Center Welcomes New Executive Director

Please join us in welcoming Don Byrne, the new Executive Director of the Center for Plain Language. Don was Assistant Chief Counsel for Regulations at the Federal Aviation Administration for many years, prodding engineers and other lawyers to write clearly. He helped the agency implement the Clinton executive memo on plain language and received one of Al Gore's no-gobbledygook awards. Since his retirement from the government, he's been working with Joe Kimble to develop plain language training for lawyers. As the Center's director, he will focus on implementing Center programs and providing day-to-day management support.

### The Center Elects New Board of Directors

July 1, 2007. The Center welcomes three new members and two returning members to the Board of Directors. New to the Board:

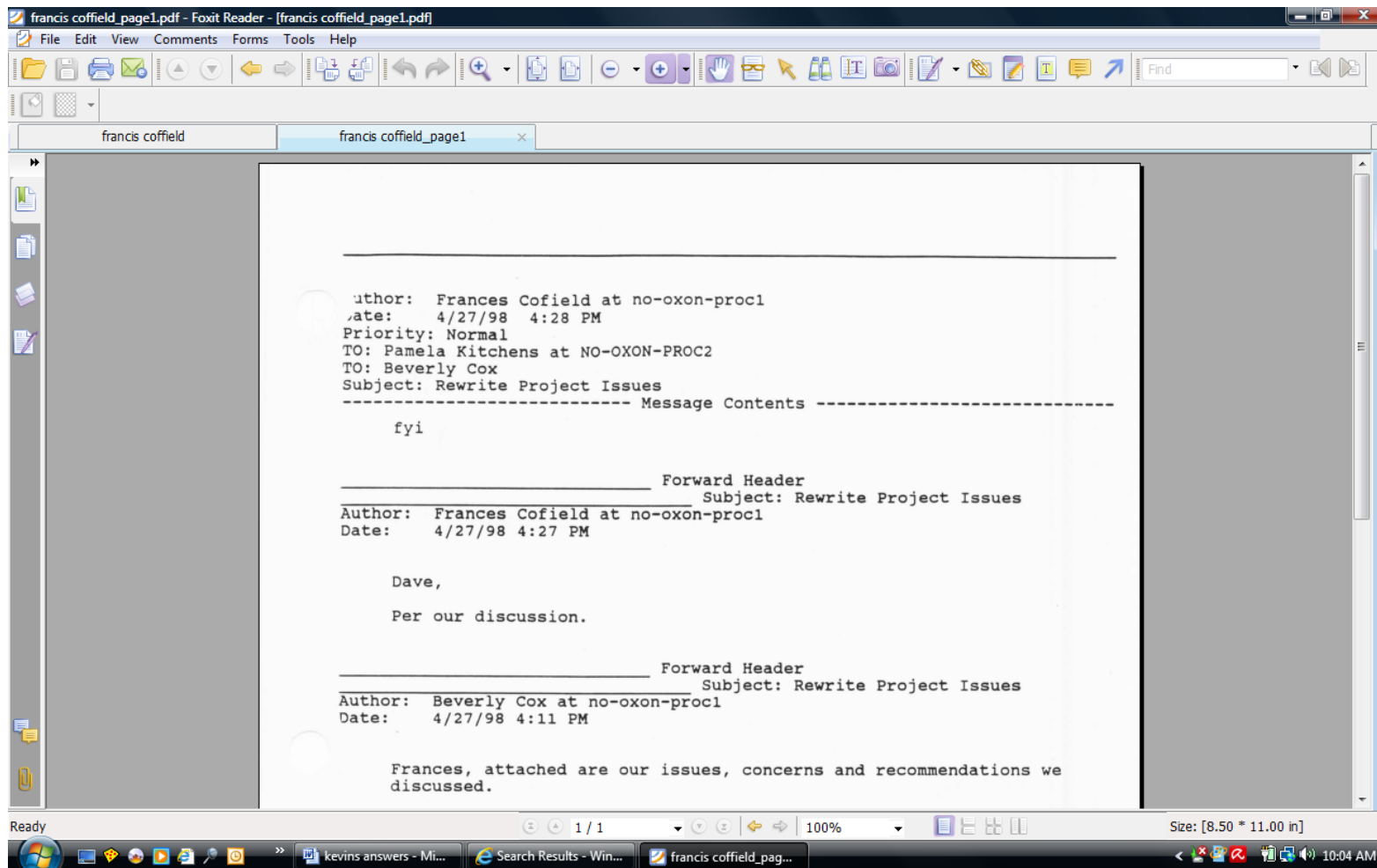
- Dana Howard Botka is the "Plain Talk" Coordinator for Washington Governor Christine Gregoire. In her position,

Two Board members were reelected:

- Joanne Locke is Chair of PLAIN and Plain Language Advisor for the Office of Disease Prevention and Health Promotion in the US Department of Health and Human Services, where she focuses on linking plain language and health literacy. She co-chaired the 2005 International Plain Language Conference.
- Melodee Mercer is best known as Plain Language Instructor for the US Department of Veterans Affairs. Melodee's award-winning satellite course, Reader-Focused Writing, has trained thousands of employees to write in plain language. Melodee has received many awards for her plain language work, including the IRS Deputy Commissioner's Award, the US Distance Learning Association's Outstanding Instructor in Government Award, and the International Communicator's Crystal Award of Excellence.

## Treasury Executives Lisa Ross and Nancy Killefer's Connection to Mercer and Cheek

Nancy Killefer, Lisa Ross, David Williams who headed IRS Communications, Rob Wilkerson, Francis Coffield, Pamela Kitchens, Beverly Cox Ann Gelineau and several other individuals met in Nancy Killefer's office at U.S. Treasury to discuss Treasury's plan to give TWC's in-process notices to NPR and Emmerling Post—a company working for Treasury. Treasury's goal was to determine if NPR and EP could improve upon TWC's work. The proposal was of significant concern to certain contracting officers who evidenced throughout the contract a desire to comply with federal contracting statutes:



Supposedly, Treasury had a number of concerns about TWC's in-process notices. TWC had only begun working on the project and was formulating writing strategies, methodologies and graphic design. In the end, taxpayers preferred TWC's design to its competitors.

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April 27, 1998

**REWRITE PROJECT  
ISSUES/ CONCERNS/RECOMMENDATIONS**

**1. ISSUE:** The inclusion of the National Performance Review (NPR) Plain Language Group in the notice review process under Contract TIRNO-98-W-00001.

**CONCERNS:**

a. The contract currently includes a 4 tier review process, the monitoring of which is the responsibility of the contractor. It is proposed the NPR review be included with the IRS response to any particular notice in order to eliminate another "layer" in the review process. There are contractually required turnaround times at each review process. It will be imperative that NPR's reviews be timely in conjunction with the turnaround times required by the contract. As an in-house function, this will require very close monitoring and communication by the COTR with the NPR which may prove very time-consuming. Will the COTR have the authority to "nudge" the NPR for comments?

b. An additional review may impose more IRS changes than would have been generated with the 4 Tier Reviews. This will require more hours/funding on the contractor's part to incorporate these changes.

c. The contract currently provides that the contractor **may or may not** incorporate all suggested EDITORIAL changes, but if a stakeholder believes an omitted change should be included, the decision goes to the Content Editor or Gatekeeper on whether or not to include it. This circumstance needs to be considered on editorial changes recommended by the NPR; e.g., will all editorial changes recommended by the NPR be required to be incorporated into the contract? If so, a statement of work change is required. This equates to additional funding and time.

**RECOMMENDATIONS:**

a. Should NPR be included in the notice review, the extent and timing of its review and incorporation of its recommended changes need to be understood by all parties.

b. The Writing Company should be made aware of the review by the National Performance Review Plain Language Group.

c. Close monitoring by the COTR will be imperative.

**2. ISSUE:** There is concern with the Notice Format offered by The Writing Company. It is suggested a consultant, like Emerling Post, be hired to review notice format.

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Page 2

2

**CONCERNS:**

- a. If it is anticipated that the results of the consultant's review will be incorporated into the rewrite contract, time is of the essence.
- b. The statement of work for a consultant to review notice format must be outside the scope of the work being performed by The Writing Company. We must be sure we are not paying for an effort already being performed.
- c. If the statement of work required does not fall under the current Emerling Post contract, a competitive procurement would be required unless there is a justified sole source. A competitive procurement will take longer and both will impact schedule.
- d. If the results of the consultant's review are planned to be incorporated into the rewrite contract, additional funds and time will be required.
- e. Depending on the outcome and timing of the consultant recommendations, there may be an impact on system acceptance testing under the current contract and all masters submitted to date. This equates to additional time and funding.
- f. There may be a potential conflict between contracts. Focus group testing of The Writing Company format may prove positive or require only minor changes and the recommended format from the consultant is radically different.

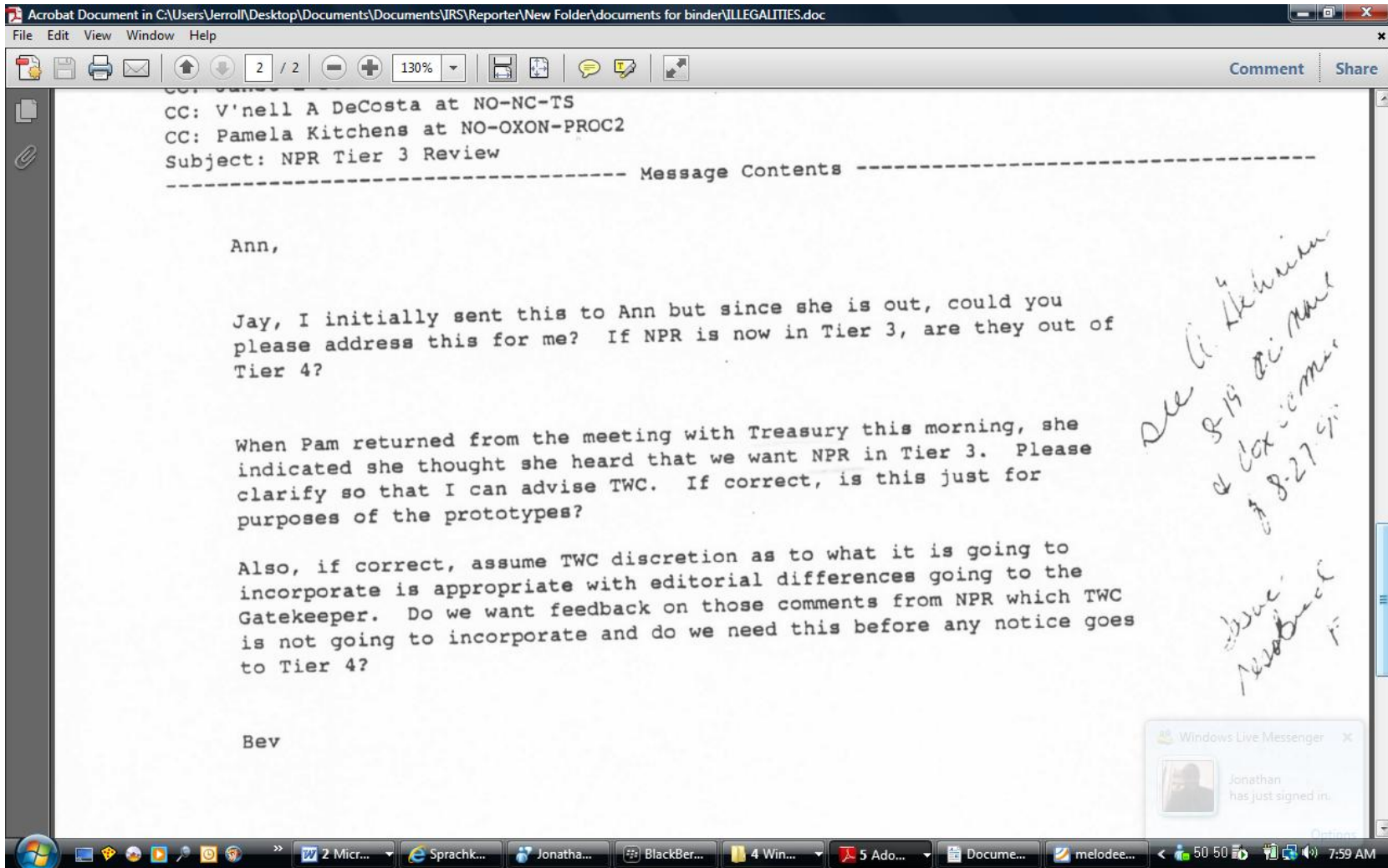
**RECOMMENDATION:**

- a. Determine the inclusion of NPR in the notice review process ensures that the rewritten notices comply with and meet the objectives of the project and the NPR Plain Language Group and a consultant format review contract is NOT NECESSARY.
- b. Pursue suggestion by customer to show Treasury the format of the four prototypes developed in-house which were subject to focus group testing by the public/taxpayers and businesses as candidates for format standard.

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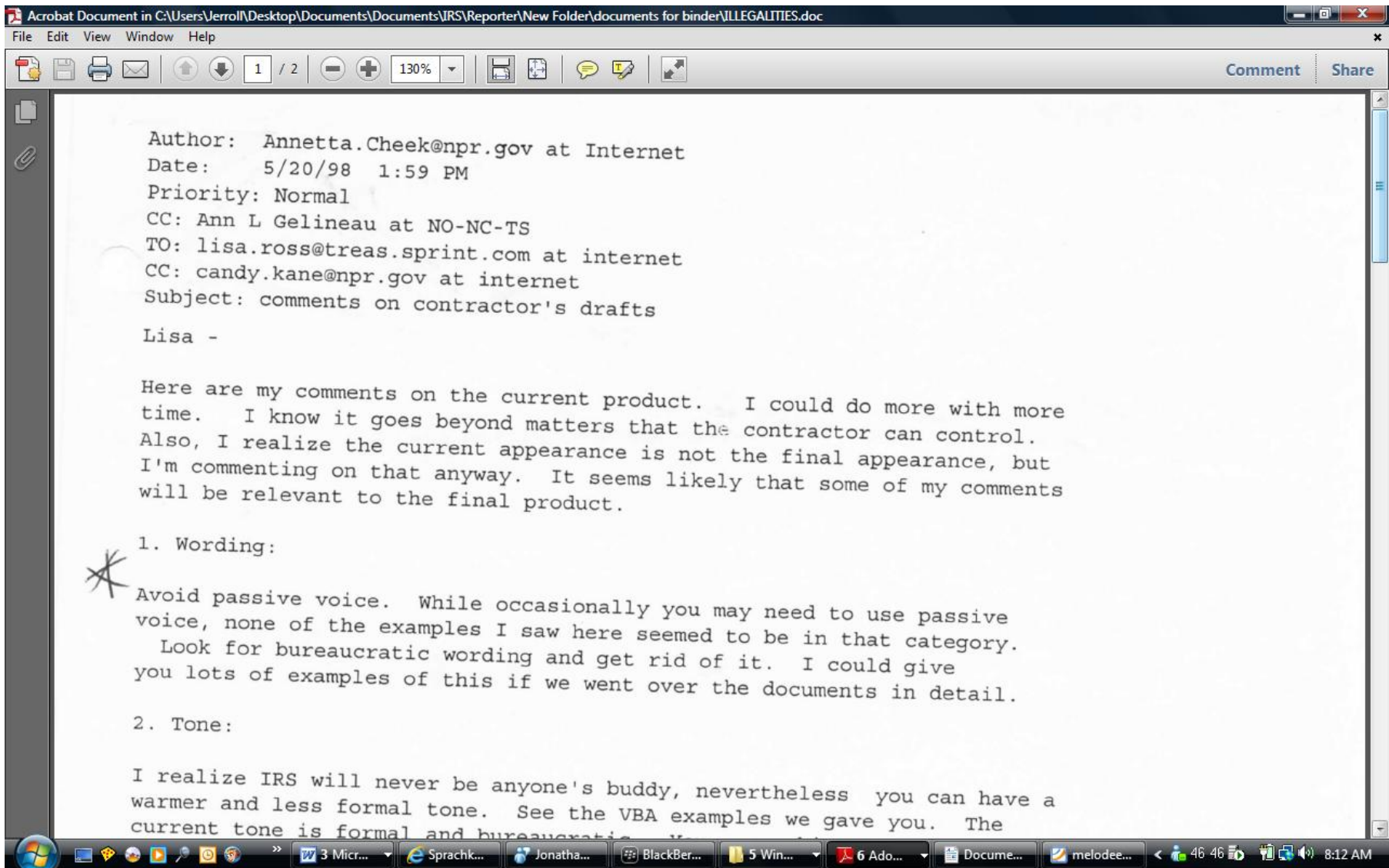
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Treasury (Ross and Killefer) ignored contracting's concerns and instructed IRS to embed NPR permanently in TWC's contract to oversee TWC's writing efforts.

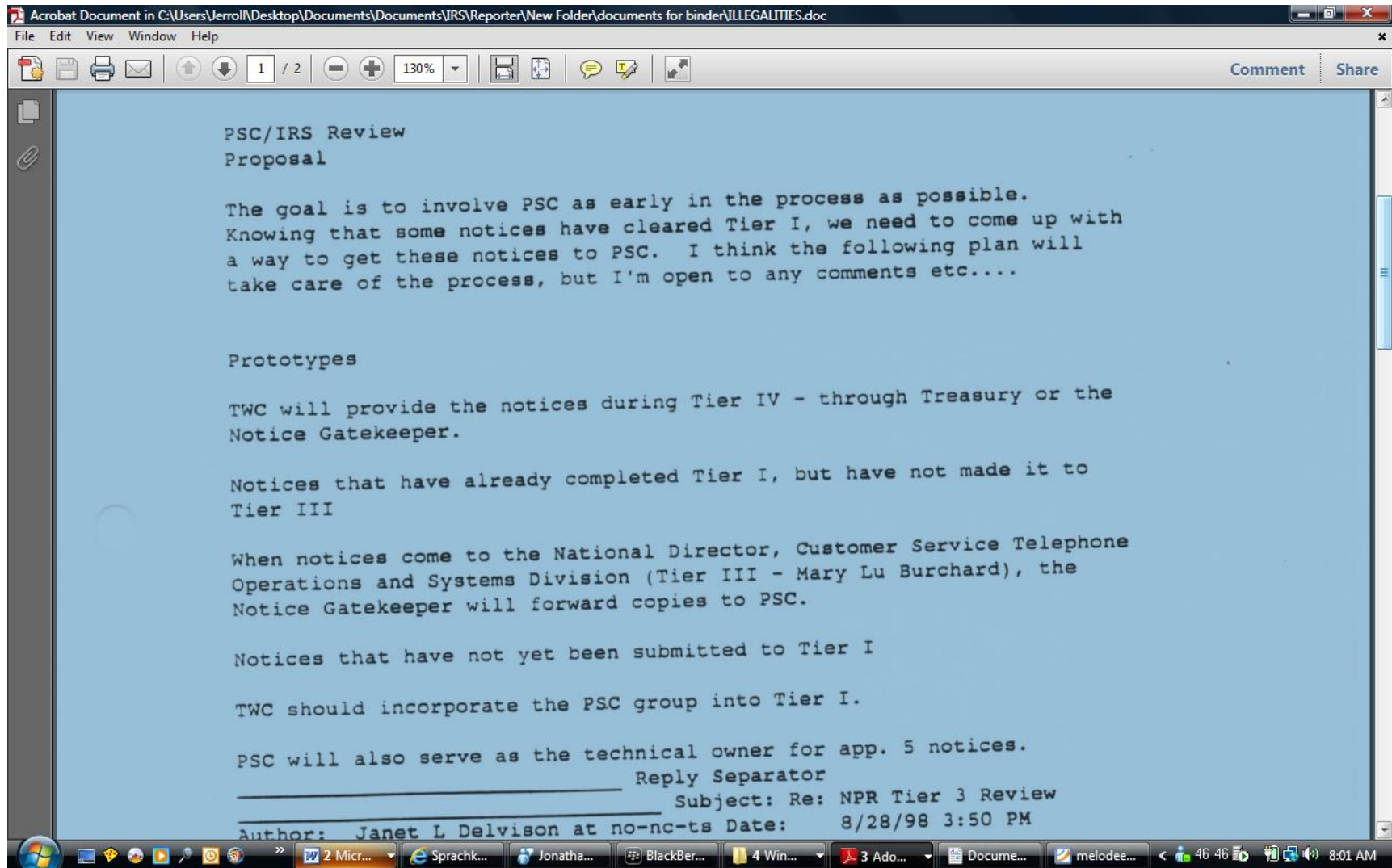




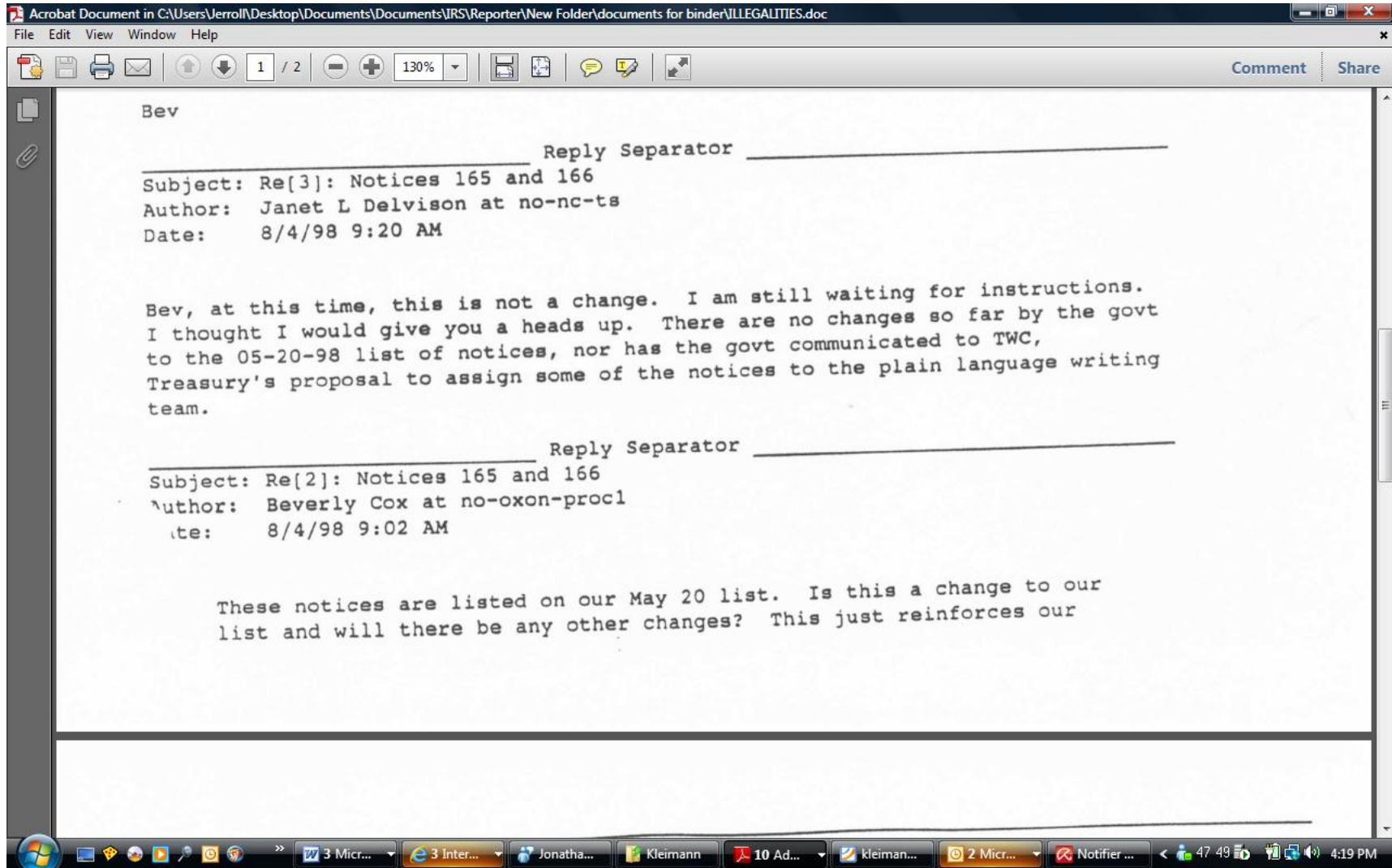
Annetta Cheek of NPR sends comments regarding TWC's notices to Lisa Ross. Ross continued to insist NPR evaluate TWC's work even though most taxpayers surveyed preferred TWC's notices to those of its competitors (NPR and EP).



Treasury then directs IRS contracting to embed PSC (another name for NPR) in TWC's rewrite and redesign process as early in the process as possible. TWC's work is subject to NPR's approval and review.



The following statement, “nor has the government communicated to TWC Treasury’s proposal to assign some of the notices to the plain language writing team,” indicates Treasury intent to divert some of TWC’s work to NPR. TWC remained on-schedule despite repeated alterations of its critical timeline by Treasury.



TWC also continued to receive excellent reviews from IRS stakeholders, including Michael P. Dolan who was Deputy Commissioner of IRS at the time. Dolan also served two extended appointments as acting IRS Commissioner.

http://www.irs.gov/pub/irs-utl/michael\_p\_dolan.pdf

irs.gov

Michael P. Dolan

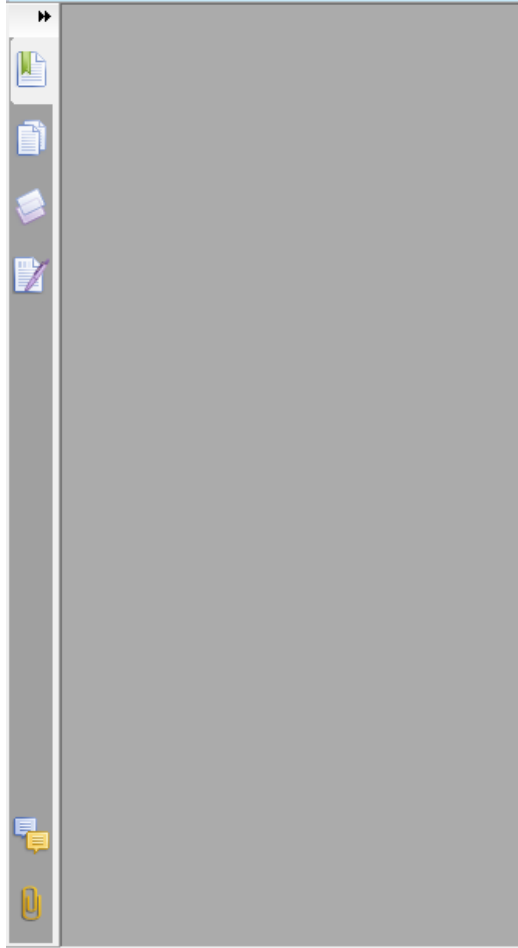
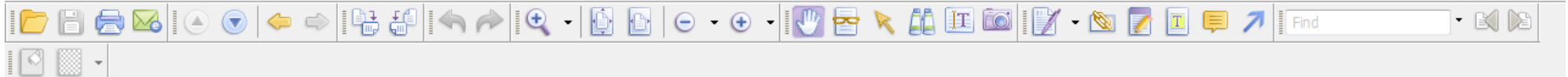
**Function and Specialization**  
Mr. Dolan is KPMG's, Practice, Procedure & Administration Group's National Director of IRS Policies and Dispute Resolution. He works with a group of KPMG professionals who help clients creatively resolve complex IRS controversies and procedural issues.

**Background**  
Mike joined KPMG's Washington National Tax practice in March of 2000. He brought with him nearly 30 years of tax administration experience -- 28 of which were gained with the Internal Revenue Service. During the last six years of his IRS career Mike served as the IRS Deputy Commissioner with two extended appointments as Acting Commissioner. As Deputy Commissioner Mike supervised all IRS headquarters and field activities and he possesses a broad knowledge of IRS operations, procedures and personnel.

**Professional and Industry Experience**  
Mike has worked extensively with a broad range of the firm's clients to resolve their federal tax controversies and complex IRS practice and procedure issues. He has

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**REVIEW**

**Form Number: 100**

**It is critical that you fax or mail response by Friday, September 4, 1998, to:**  
*The Writing Company, 727 North First Street, Suite 210, St. Louis, MO 63102*  
 314.421.9748 PHONE ■ 314.421.6683 FAX

---

Respondent's Name: Dolan  
 Title: Dep Comm

E-mail: (202) 622-4255 / 622-5739 (Vms)  
 Phone Number/Voice Mail

- Language is:  
 1-----2-----3-----4-----5-----6-----7-----8-----9  
 Very simple      Simple      Adequate      Not simple enough      Not simple at all  
 (2) is circled above 2.
- Directions are written and presented in a clear, easy-to-follow manner.  Yes  No  
 If directions are not clear, indicate where improvements are needed. (Continue on a separate sheet if you need more space.)
- The overall tone is:  
 1-----2-----3-----4-----5-----6-----7-----8-----9  
 Friendly      Businesslike      Neutral      Bureaucratic      Threatening  
 (3) is circled above 3. A handwritten note "or positive ratings" points to the 3-4 area.
- Do you agree with deletions indicated by text that is marked through on the attached PRP?  
 Yes  No  
 If any deletion is not accurate, please indicate required changes. (Continue on a separate sheet if you need more space.)
- The overall content is:  Accurate  Not accurate  
 If content is not accurate, please indicate required changes. (Continue on a separate sheet if you need more space.)  
 Please indicate if we should suspend tier review until changes are made and approved by respondent.  
 Yes  No
- In terms of visual appeal and clarity, the document's graphic appearance is:  
 1-----2-----3-----4-----5-----6-----7-----8-----9  
 Excellent      Good      Average      Fair      Poor  
 (2) is circled above 2.  
 If fair or poor, please suggest changes. (Continue on a separate sheet if you need more space.)
- Overall, I rate this document:  
 1-----2-----3-----4-----5-----6-----7-----8-----9  
 (2) is circled above 2.

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**REVIEW FORM NO. 01-222**

**It is critical that you fax or mail response by Friday, September 4, 1998, to:**  
*The Writing Company, 727 North First Street, Suite 210, St. Louis, MO 63102*  
 314.421.9748 PHONE ■ 314.421.6683 FAX

Respondent's Name: Dolan      E-mail: \_\_\_\_\_  
 Title: Dep Com      Phone Number/Voice Mail: (202) 622-4255 / 622-5739 (Vms)

1. Language is:  
 1—2—3—4—5—6—7—8—9  
 Very simple      Simple      Adequate      Not simple enough      Not simple at all

2. Directions are written and presented in a clear, easy-to-follow manner.     Yes     No  
 If directions are not clear, indicate where improvements are needed. (Continue on a separate sheet if you need more space.)

3. The overall tone is:  
 1—2—3—4—5—6—7—8—9  
 Friendly      Businesslike      Neutral      Bureaucratic      Threatening

4. Do you agree with deletions indicated by text that is marked through on the attached PRP?  
 Yes     No  
 If any deletion is not accurate, please indicate required changes. (Continue on a separate sheet if you need more space.)

5. The overall content is:     Accurate     Not accurate  
 If content is not accurate, please indicate required changes. (Continue on a separate sheet if you need more space.)  
 Please indicate if we should suspend tier review until changes are made and approved by respondent.  
 Yes     No

6. In terms of visual appeal and clarity, the document's graphic appearance is:  
 1—2—3—4—5—6—7—8—9  
 Excellent      Good      Average      Fair      Poor

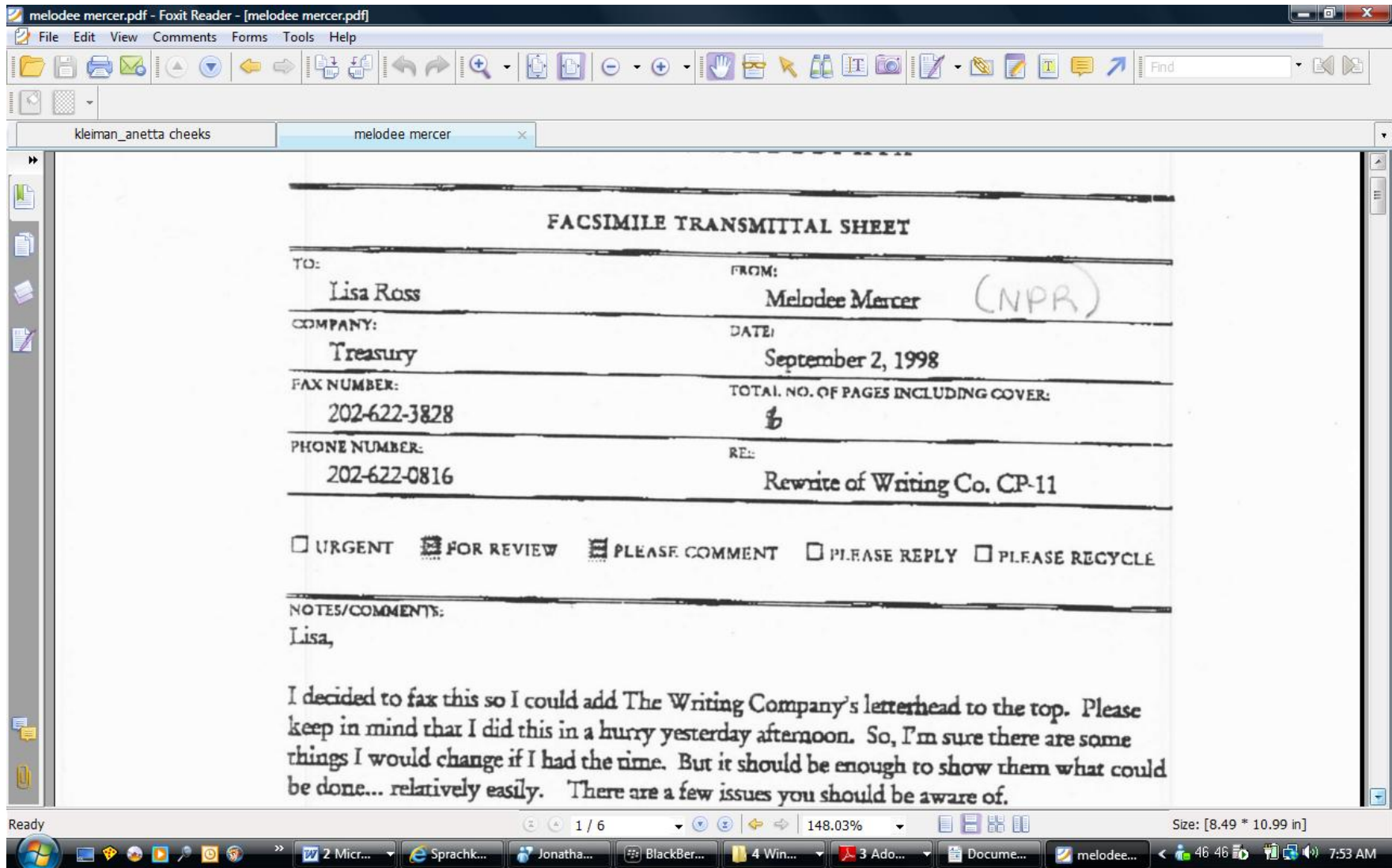
If fair or poor, please suggest changes. (Continue on a separate sheet if you need more space.)

7. Overall, I rate this document:  
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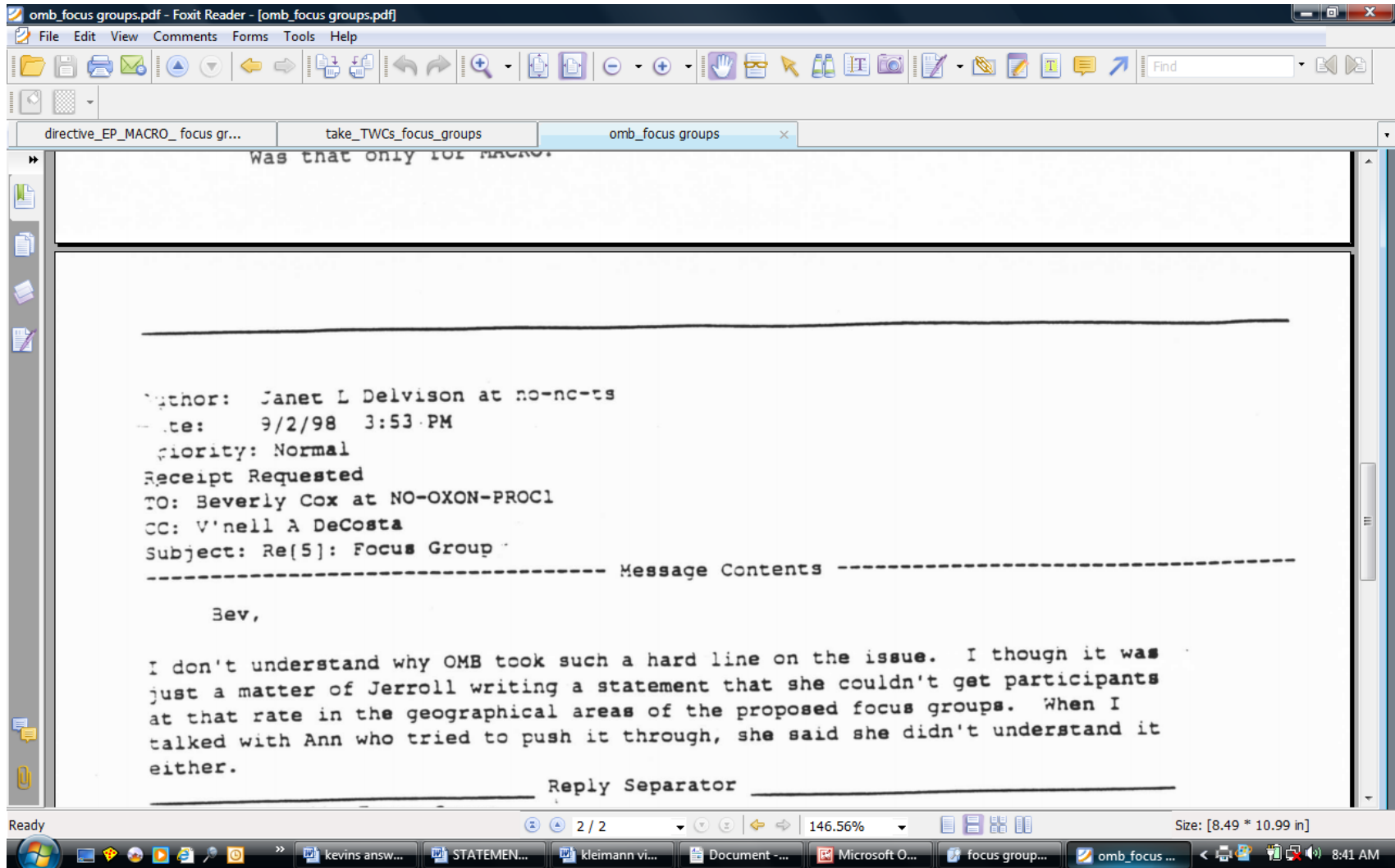
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Lisa Ross and Melodee Mercer are communicating about TWC's work. When the three notices were tested nationwide, TWC—project management for the entire project—was not permitted to attend the focus groups even when we offered to pay our own travel and lodging. It is unorthodox for the project manager to be prohibited from attending project focus groups.



Only a few weeks earlier, OMB approved an industry standard honorarium for the vendor (MACRO International) Treasury selected to focus group test NPR's, TWC's and EP's taxpayer notices. Persons at IRS were perplexed when OMB refused to afford TWC the same honorarium for the exact same focus groups. TWC's focus group vendors cancelled all TWC's focus groups, complaining the honorarium was below standard—almost causing TWC to miss its delivery deadline. At the time, OMB reported to Killefer.





Jerroll Sanders of The Writing Company contacted Valerie Jarrett's secretary in January 2009, indicating her intent to challenge Killefer's appointment as President Obama's Chief Performance Officer. Sanders also disseminated nationally the press release shown below via BlackPR.com.

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Date: Thu, 22 Jan 2009 13:16:44 -0500  
From: pr@blacknews.com  
To: buzzbusiness@hotmail.com  
Subject: PR: Detroit Mayoral Candidate Asks Obama to Reconsider Pick

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To unsubscribe, follow the instructions at the bottom of this email.

**FOR IMMEDIATE RELEASE**  
January 22, 2009  
**CONTACT:**  
Jerroll Sanders  
313-721-0914 / 313-397-4474  
Info@motownmayor.com

**DETROIT MAYORAL CANDIDATE ACCUSES OBAMA'S PICK, NANCY KILLEFER, OF ILLEGAL CONTRACTING; ASKS OBAMA TO RECONSIDER**



Jerroll Sanders, Candidate for Mayor of Detroit  
**Detroit, MI** (BlackNews.com) - Detroit Mayoral Candidate and Obama supporter Jerroll M. Sanders is asking President Barack Obama to reconsider his selection of Nancy Killefer for Chief Performance Officer--a pick Obama called one of the most important appointments he will make. Sanders--formerly President and CEO of Jireh Consulting, Inc., dba The Writing Company (TWC)--says Killefer and associate Lisa Ross-McGonigle--both of whom had IRS

Day after the press release, Valerie Jarrett's secretary telephoned Sanders and advised Killefer had rescinded her acceptance of Obama's appointment.

http://abcnews.go.com/blogs/politics/2009/02/another-tax-pro/

Executive Secretariat | Executive Board | Center for Pl... | Obama performance czar to w... | Another Tax Problem for O...

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Find: killef Previous Next Options

KILLEFER

Political coverage and musings on pop culture from ABC News Senior White House Correspondent Jake Tapper and the ABC News White House team.

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- WHAT WOULD YOU DO
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- WORLD NEWS NOW
- WORLD NEWS WITH DIANE SAWYER

By Huma Khan @humalk

Feb 3, 2009 10:28am

## Another Tax Problem for Obama Nominee

The informal battle between members of the Obama Administration and the Taxman resulted in a casualty Tuesday, with news that President Obama's nominee to be chief performance officer, Nancy Killefer, will withdraw her nomination following the revelation that she had a \$946.69 lien on her property in 2005 for failure to pay taxes.

Killefer, who was announced to much fanfare by President Obama on Jan. 7 to serve in the new position to make the U.S. government "more effective, more efficient, and more transparent," is the third high-level Obama Administration official whose failure to pay taxes in recent years was disclosed in the past month.

A former officer with McKinsey & Company and the past assistant secretary for management, chief financial officer and chief operating officer at Treasury during the Clinton administration, Killefer joins the ranks of **Treasury Secretary Tim Geithner**, who failed to pay more than \$40,000 in payroll taxes when he worked for the International Monetary Fund, and Secretary of Health and Human Services nominee Tom Daschle, who — **as ABC News was first to report last Friday** — on Jan. 2 filed more than \$140,000 in back taxes and interest, having failed to disclose more than \$300,000 in past income, including the use of a car and driver for three years.

The Associated Press broke the story of Killefer's tax lien placed against Killefer's home in Washington, D.C., for failing to pay unemployment compensation taxes on household help. The issue was resolved five months after the D.C. government took action.

When President Obama announced Killefer's new post, he called Killefer "an expert in streamlining processes and wringing out inefficiencies so that taxpayers and consumers get more for their money. And during her time at Treasury, she helped bring the department into the 21st century, modernizing

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