ANNUITY • HEALTH & WELFARE • PENSION

BOILERMAKERS

NATIONAL FUNDS

Boilermakers National Funds Style Guidelines

Communication Standards

February 2009

Logos

The Boilermaker logo is the key visual symbol identifying the company and reinforcing its name as a leader in innovative benefits system to protect the health, wealth, and future of participating boilermakers. There are four logos that can be used for company materials. The logos shown on this page are the correct logos.

Logo Design Elements and Colors

All Boilermakers National Funds logos are black in color. A reversed logo can be used when the logo is placed on a dark background.

Logo Placement on Backgrounds

If the logo is placed on a background of any color, it needs to be a transparent logo. If the logo is not transparent, there will be a large white box surrounding the logo. Depending on how dark the background, you may use either a black transparent logo or a white transparent logo (see below).

Available Logos

Please contact Communications for the logos.

Note: For Microsoft Office applications (Word, PowerPoint, Excel, etc) please use the WMF version. A PNG version can be used on the BNF Web site. For materials that will be commercially printed, please use the EPS or TIF versions. Available formats are listed below:

Boilermakers National Funds

Black Logo versions:

- BM_NF_Main_K.eps
- BM_NF_Main_K.tif
- BM_NF_Main_K.png
- BM_NF_Main_K.wmf

Reversed Logo Versions:

- BM_NF_Main_ROW.eps
- BM_NF_Main_ROW.tif

- BM_NF_Main_ROW.png
- BM_NF_Main_ROW.wmf

Boilermakers National Health and Welfare Fund

Black Logo versions:

- BM_NHWF_Logo_K.eps
- BM_NHWF_Logo_K.tif
- BM_NHWF_Logo_K.png
- BM_NHWF_Logo_K.wmf

Reversed Logo Versions:

- BM_NHWF_Logo_ROW.eps
- BM_NHWF_Logo_ROW.tif
- BM_NHWF_Logo_ROW.png
- BM_NHWF_Logo_ROW.wmf

Boilermakers National Annuity Trust

Black Logo versions:

- BM_NAT_Logo_K.eps
- BM_NAT_Logo_K.tif
- BM_NAT_Logo_K.png
- BM_NAT_Logo_K.wmf

Reversed Logo Versions:

- BM_NAT_Logo_ROW.eps
- BM_NAT_Logo_ROW.tif
- BM_NAT_Logo_ROW.png
- BM_NAT_Logo_ROW.wmf

Boilermaker-Blacksmith National Pension Trust

Black Logo versions:

- BM_BNPT_Logo_K.eps
- BM_BNPT_Logo_K.tif
- BM_BNPT_Logo_K.png
- BM_BNPT_Logo_K.wmf

Reversed Logo Versions:

- BM_BNPT_Logo_ROW.eps
- BM_BNPT_Logo_ROW.tif
- BM_BNPT_Logo_ROW.png

- BM_BNPT_Logo_ROW.wmf

Fonts

The corporate font families have been chosen based on their flexibility, legibility and wide availability. Type is an integral part of the corporate identity, and when used with the logo elements it becomes a powerful visual communication tool. The corporate typefaces are required to support a consistent image in all communications generated by Boilermakers National Funds.

Primary Corporate Typeface

The primary corporate typefaces are the Arial, Impact, and Futura font families. Each of the typefaces is used in various ways. (Please remember when using typefaces never replace corporate fonts with fonts that appear similar.)

Logo and Boilermakers Identity System

- Impact is the main "Boilermakers" logo art element.
- Futura Medium Condensed is the "labeling" logo art element.

Web Site

- Arial is the preferred typeface for web content.
- The standard type size for body text should be 8.5-point (HTML 2).

Word & Word Perfect Documents

- Arial is the preferred typeface for text, headlines, special callouts, subheads and captions.
- Times New Roman or Futura can be used the in footer as an accent font.
- The preferred type size for body test should be 12-point. Headings are 14-point bold typeface, with a 24-point space in between and subheadings are 12-point and bold typeface with a 12-point space in between.
- Arial 8-point is used in the Board Member listing and executive staff listings on letterhead and other templates.

PowerPoint

- Arial is the preferred typeface for text.
- The preferred type size for bullets is 28-point. Secondary bullets are 24-point and so on. These sizes can be adjusted if needed due to amount of content.
- Headings and subheadings on the title slide are Impact 38-point and Arial 22-point respectively. Headings on the interior pages are also Impact 38-point but can be reduced in size if needed.

Creative Documents (Quark or InDesign)

- Futura font family is the preferred typeface for text and headlines.
- Arial font family is reserved for special callouts, subheads, introductory text and captions.
- The preferred type size for body test should be 10 - 12 points depending on the document.

While 12-point Arial is the standard font for general communication, it is OK to use the 10-point Arial font on forms.

File Naming Convention

A file naming convention is a consistent way to name and catalog documents created and filed on the computer. When creating a file naming convention, it is essential to set consistent standards on:

- What naming elements are to be used and their order
- The use of a consistent separator
- The use of abbreviations
- What constitutes a new version number
- What to include in the header/footer of the document

Names and Order

The department name should appear first, followed by the document title, document type and date it was created in the MM/DD/YYYY format with no spaces or separators. If applicable, a version number should follow the date. When a file is final and approved, it is appropriate to attach the word FINAL in all caps at the end of the file name.

- Basic Format: Department FileName DocumentType MMDDYYYY.Extension
- Example: HW Amendment55 NOTICE 01012010.doc
- Example of a Version: HW Amendment55 NOTICE 01012010-2.doc
- Example of a Final Document: HW Amendment55 NOTICE 01012010 FINAL.doc

Department/Business Unit

Depending on the use of the information, this could be the business unit or program area.

Be cautious of using branch names as these are subject to continual change. Program areas, which are business functions, change less often (e.g., they may reside in different branches or divisions over time).

The following are current codes:

Department/Business Unit	Code
Annuity	ANU
Boilermakers National Funds (For documents used by more than one department or business unit)	BNF
Communications	COM
Employer Contributions	EC
Pension	PEN
Trustees	TRU

File Title

Think of the user/recipient and how they might search for and retrieve the file. Use a title that clearly describes the content of the file. The name should be intuitive to those who need to access it but not excessively long. Use CamelCase capitalization for multi-word titles instead of using spaces, dashes or underscores to separate the words. When creating multiple versions, use the same title for all versions.

- ▪ Example: COM StyleGuide DOC 01012010.doc

File Type

File type can help reduce the length of the title.

In most business units only a subset of these standard abbreviations may be needed. It is best to keep to the list short so that people can easily remember the codes.

The following are current abbreviations:

File Type	Abbrevation
Agenda	AGD
Agreement	AGMT
Budget	BDG
Contract	CON
Documentation	DOC
Example or Sample	EX
Form or Application	FORM
Instructions or Handbook	INST
Letter	LTR
List	LST
Memo	MEM
Meeting	MTG
Notice	NOTICE
Report	RPT
Summary Annual Report	SAR
Summary Plan Descritpion	SPD
Summary	SUM
Web Content	WEB

Date

This is the date you are working on or saving the file. This helps to identify the most recent version of the file. If you start another version on the same date, versioning will come into play.

Use MMDDYYYY to facilitate the sorting and display of files in a logical order.

Extension

Use the appropriate extension for the application in which the file has been created. **Extensions are automatically generated and attached to the end of the file name by the application.** The extension will be used by the system to determine which application was used to create the file.

Do not add different extensions or text after the extension. The following is a list of common application extensions:

Application	Extension
Word	.doc
PowerPoint	.ppt
Excel	.xls
PDF	.pdf

Consistent Separator

In general, it is best to use an underscore to separate elements of the name.

However, some web-based applications interpret underscores differently. We use spaces rather than underscores between naming convention elements to avoid this problem.

Abbreviations

Consistently used abbreviations can keep the name length manageable. However, if abbreviations are not standardized, they can be very difficult to interpret after the passage of time. A list of acceptable abbreviations for departments and file types is provided. As business needs develop, new abbreviations may be created and added.

Use of Headers and Footers

Some of the components discussed in this guide could also be included in the header or footer of a document. This will facilitate easy location identification from printed documents.

Versions

There is no one recognized approach to identify a version. To keep versioning simple and manageable, we use the most current date in the naming convention. If you need a new version within the same date, add a version to the end of the date as shown in the example on page seven.

Document Naming Convention

A document naming convention helps create a standard, recognizable, understandable format for the public name of a document. We use the document naming convention for situations where the file naming convention is not appropriate or useable. For instance, we wouldn't want to put the file name of a document on the Web site for participants to sort through, because it would be difficult for them to understand, instead we use the document naming convention. The document naming convention is also used for, but not limited to, naming letter writing letters.

An easy way to distinguish between a file naming convention and a document naming convention is a file naming convention is primarily for internal use, and document-naming convention is primarily for external use.

Department/Business Unit

When creating a document name, first you want to use the Department/Business unit code. These are the same codes we use for the file naming convention. You will assign one of the codes below to every document you name.

Department/Business Unit	Code
Annuity	ANU
Boilermakers National Funds (For documents used by more than one department or business unit)	BNF
Communications	COM
Employer Contributions	EC
Pension	PEN
Trustees	TRU

Notices

Next you want to consider the document type. Most documents we create are notices. The naming convention for notices always uses the word notice after the Department or Business Unit: For example:

PEN – Notice of Amendment 1 (204(h))

PEN – Notice of Federal Income Tax Withholding

This way, all notices will group together when a long list of documents is organized in ascending order.

Letters, Forms, Examples

Given the many letters we create and use here, it is best to try and group the letters by using a consistent document naming convention. Start with the broadest category and work your way down. Maintain consistency in naming items among letters. Put the word letter at the end of the name. For example:

HW – COBRA Verification of Other Coverage Letter

HW – COBRA Request for Additional Information: Divorce Decree Letter

HW – COBRA Request for Additional Information: Divorce Decree, Marriage Certificate Letter

HW – COBRA Request for Additional Information: Marital Status Letter

In the above example, COBRA was the broad category, then we listed the letter as a verification or request, then we listed, in alphabetical order, the specific items requested. By grouping from broad to specific categories, when in a list in ascending order, they will group together logically.

The same naming process should be used for forms, examples and any items other than a notice.

Numbers and Dates

When using the document naming convention, always list dates and numbers last. For example:

PEN – Notice of Amendment 1

PEN – Notice of Amendments 7, 8, and 9

PEN – Summary Annual Report 2006

PEN – Summary Annual Report 2007

End Result

Thinking of the user/recipient and how they might search for and retrieve the document and consistency in naming items is the key to making the document naming convention work. Below is a snapshot from the Pension downloads section on the www.bnf-kc.com. The documents are named using this document naming convention. Notice how it groups like items together for easy reference.

DOWNLOADS ▶

Find documents, forms, summary plan descriptions (SPD) and other downloads here.

For Active Participants
  Annuity
  Pension
      PEN – 12th Restatement of the Pension Plan Document
      PEN – Administrative and Trustee Update
      PEN – Amendment 1
      PEN – Annual Reports 2007 Cover Letter
      PEN – Authorization to Release Personal Information Form
      PEN – Direct Deposit Form
      PEN – Estimate Request Form
      PEN – EXAMPLE Beneficiary Card for Married Participant Non-Spouse Beneficiary
      PEN – EXAMPLE Beneficiary Card for Single Participants
      PEN – EXAMPLE Beneficiary Card for Married Participant Spouse Beneficiary
      PEN – Notice of Amendment 1 (204(h))
      PEN – Notice of Amendments 7, 8 and 9 (204(h))
      PEN – Notice of Amendment 10 (204(h))
      PEN – Notice of Amendments 3-6 to the 12th Plan Restatement
      PEN – Notice of Annual Funding 2006
      PEN – Notice of Annual Funding 2007
      PEN – Notice of Annual Funding 2008
      PEN – Notice of Annual Funding 2009

Web Site Guidelines

As readers scan a Web site page they are subconsciously aware of everything on it. First they survey the graphics on the page, and then they read the content. It is important to not only have the right kind of content on the page but to also have consistent typography and graphics. These attributes help the reader understand and absorb the substance of the page content.

Primary Corporate Typeface

The primary corporate typeface for the Boilermakers Web site is the Arial font family. (Please remember when using typefaces never replace corporate fonts with fonts that appear similar.)

Web

- Arial is the preferred typeface for web content.
- The standard type size for body text should be 8.5-point. The type size for headlines is also 8.5-point, however, the letters are in all caps.
- Text placed on the right hand navigation is Arial 7.5-point.

Styling Content

The most important thing to remember is to let the system do the styling for you. That is, never manually choose a typeface or point size for a selection of text. Instead, choose a predefined style (Normal, Heading 1, Heading 2, etc.).

Pasting from Microsoft Word

In short: **DON'T.**

It may be tempting to develop content in a word processor like Microsoft Word and then copy and paste the content into the site's editor. But doing so will bring a number of undesirable formatting options along with it. To avoid this problem, copy the text from Word and then paste into a text editor like WordPad or Notepad to strip out formatting codes. Then, copy this new text and paste it into the editor. Make sure to make bold or italics any text that was styled that way in the original Word document.

Callouts

We invite you to call **1-800-242-5444** Monday – Friday 7 a.m. – 7 p.m. CST and Saturdays 7 a.m. – 3 p.m. CST to speak with a Customer Care representative. After hours, use our interactive voice response system for medical eligibility and benefit information only.

Callouts are small content items that appear on the right-hand side of the page (navigation area) or in the body content and whose purpose is to call attention to something. Think of them as ads.

Free-Form

This type of callout displays under the Section Manager area and is sort of a catch-all. Anything that can't be done in the other formats can usually be done here (e.g. Locations listing on the Contact Us page).

Free-Form Specifications

Dimensions: 215 wide (vertical dimension will vary) @ 72dpi

Format: JPG, 60% quality, RGB

Alternate format: GIF, adaptive palette, 256 colors
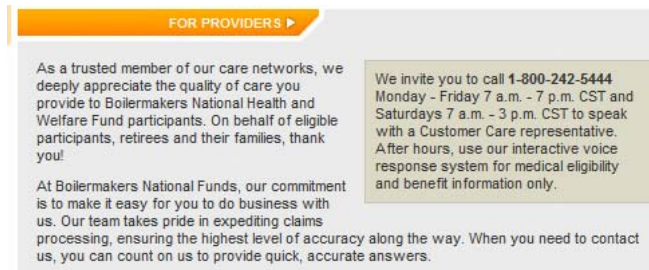
Format: JPG, 60% quality, RGB
Alternate format: GIF, adaptive palette, 256 colors

Images

Home Page Photos

Dimensions: 705 pixels wide x 200 pixels tall @ 72dpi
Format: JPG, 60% quality, RGB
Alternate format: GIF, adaptive palette, 256 colors

Interior Page Photos

Dimensions: 485 pixels wide x 200 pixels tall @ 72dpi
Format: JPG, 60% quality, RGB
Alternate format: GIF, adaptive palette, 256 colors

Inline Photos (Typical)

Dimensions: 200 wide (vertical dimension will vary) @ 72dpi
Format: JPG, 60% quality, RGB
Alternate format: GIF, adaptive palette, 256 colors

Web Document Naming Convention

Many documents will not be re-created as content, rather, they will be made available on the Boilermaker Web site so members can access them. For this reason, it is important to name to documents appropriately so they can be searched.

- The complete name of the file is listed in the search results.
- Intuitive naming conventions are encouraged. When naming the documents, think of what your providers and participants will be looking for and what they would call each document. Use the name of the fund and then the topic of the document (ex. Annuity – Automatic Deposit Form).
- We have adopted the following checklist of file naming conventions to make search results most optimal for members:
- ✓ Be sure the document includes the new Boilermaker logo.
- ✓ Use upper lower case file names.
- ✓ Place spaces between each word.
- ✓ Keep file names to seven words or less; fewer words are better.
- ✓ Include a footer in every document that includes the document name, date, revised date if applicable, page number and copyright information.
- ✓ For date sensitive files or files that have been revised, add month, day and year to the bottom right-hand corner of the document.
- ✓ When abbreviations are necessary, use common, intuitive abbreviations.
- ✓ Avoid using "Final or Updated" in the file name.

Metadata

When uploading documents or graphics, you can add Metadata to them to aid in search results. This is strongly encouraged.

Plain Language

No one wants to waste time trying to understand wordy, confusing documents or information.

Good business writing uses plain language. Plain language is communication your audience can understand the first time they read or hear it. Using plain language and logical organization helps improve the readability and effectiveness of a communication. By making plain language a standard to improve our communications, we better serve our participants and other audiences.

Checklist

An easy way to think about plain language is to **write to express, not to impress.** Use this checklist to see if your communication is written in plain language. Check to see if your communication:

- ✓ Is written for the average reader - Know the expertise and interest of your average reader, and write to that person. Don't write to the experts, the lawyers, or your management, unless they are your intended audience.
- ✓ Is organized to serve the reader's needs - Put the main point or "so what" first. Put action items and exceptions last.
- ✓ Has useful headings - Headings help the reader find the way through your material. Headings should be short, but capture the essence of all the material under the heading.
- ✓ Uses "you" and other pronouns to speak to the reader - Using pronouns pulls the reader into the document and makes it more meaningful to him. Use "you" for the reader, "I" when writing question headings from the reader's viewpoint, and "we" for your agency. Omitting personal pronouns creates a cold, unfriendly, and impersonal tone.
- ✓ Uses active voice - Using active voice clarifies who is doing what; passive obscures it. Active voice is generally shorter, as well as clearer. Active sentences are structured with the actor first (as the subject), then the verb, then the object of the action.
- ✓ Uses short sections and paragraphs - Using short sentences, paragraphs and sections helps your reader get through your material. Readers get lost in long dense text with few headings. Chunking your material inserts white space, opening your document visually and making it more appealing.
- ✓ Uses the simplest tense possible. The simplest verb tense is the clearest and strongest. Use simple present whenever possible. For example, use, "We mail Pension Statements in December," not "We will be mailing a Pension Statement in December."
- ✓ Uses base verbs, not hidden verbs – Hidden verbs make writing weak and longer than necessary. Say "we manage the program" and "we analyze data" not "we are responsible for management of the program" or "we conduct an analysis of the data."
- ✓ Omits unnecessary words - Challenge every word--do you need it? Pronouns, active voice, and base verbs help eliminate excess words. Eliminate excess words, redundant words, and unnecessary modifiers. For example, in "this report is very important" you don't need "very."

- ✓ Omits antiquated phrases – Many phrases we used to use such as "this will acknowledge your", "according to our records", "in accordance with", and "kind regards" are now considered antiquated and stuffy. Read your copy out loud; if it doesn't sound like something you would say in normal conversation, rewrite it.
- ✓ Uses concrete, familiar words – Some writers mistakenly think they should use big, important-sounding words to impress the reader. This only frustrates the reader. Avoid jargon, foreign terms, legal terms, acronyms and noun strings. If you must use a certain word or acronym, define it the first time you use it.
- ✓ Uses lists and tables to simplify complex material – Shorten and clarify complex material with lists, tables and bullets. This gives your document more white space, making it more appealing to the reader.
- ✓ Uses no more than two or three subordinate levels - Readers get lost when you use more than two or three levels in a document.

Readability

In a sense, readability is a way to measure use of the plain language standard.

Readability is defined as reading ease, especially as it results from a writing style (such as plain language). Extensive research has shown that easy-reading text improves comprehension, retention, reading speed, and reading persistence. Writing to increase comprehension doesn't mean, "dumbing down" the information, it means writing as clearly and accessibly as you can.

There are many formulas for measuring readability. The Flesch Reading Ease and Flesch-Kincaid Grade Level are widely considered the most accurate measures. Additionally, they come standard in Microsoft Outlook and Microsoft Word.

Flesch Reading Ease

Rudolph Flesch, a law student with a Ph.D. in English from Columbia University, was an advocate of the Plain English Movement and developed the Flesch Reading Ease Readability Formula in 1948. The formula simply assesses the readability of a written piece on a 100-point scale. This formula has since become the standard readability formula used by many U.S. Government Agencies, including the U.S. Department of Defense.

The Flesch Reading Ease Formula scores a written piece on a scale from 0 to 100. The following scale indicates what the score means for readability:

90-100   Very Easy

80-89   Easy

70-79   Fairly Easy

60-69   Standard

50-59   Fairly Confusing

30-49   Confusing

0-29   Very Confusing

A score between 60 and 70 is considered acceptable. The higher the number, the easier the piece is to read.

Flesch-Kincaid Grade Level

This test rates a passage based on the U.S. school grade level. If a passage receives a score of 10.0, it mea a tenth grader can understand the passage. For most communications, you want to aim for a score of 8.0 or less to communicate with a general audience. As an example, Barack Obama's inaugural address was writte at an 8.3 grade level.

Enable Readability Statistics

You can easily check the Flesch Reading Ease and Flesch-Kincaid Grade Level, among other statistics, whe using Microsoft Word to communicate. Instructions for enabling these readability statistics are below.

Microsoft Word 2003

1. On the **Tools** menu, click **Options**.

2. Click the **Spelling & Grammar** tab, then select the **Show readability statistics** check box.

3. Click OK.

After you enable this feature, open a file you want to check, and check the spelling. When Word finishes checking the spelling and grammar, it displays readability statistics for the document.

Microsoft Word 2007

1. Click the Microsoft Office Button, and then click Word Options.

2. Click Proofing.

3. Make sure Check grammar with spelling is selected.

4. When correcting grammar in Word, select the Show readability statistics check box.

After you enable this feature, open a file you want to check, and check the spelling. When Word finishes checking the spelling and grammar, it displays readability statistics for the document.