



TIPS for “templating” your CEE documents.....by Soma Chakrabarti, University of Kansas

A new continuing professional development program manager often faces the challenge of creating various documents, such as statements of work, cost proposals, contracts, budgets, reports, etc. from scratch whenever there is a need. One way to meet these needs will be to follow this three-step process:

- Take stock - Check the documents that your predecessor left behind and use the format once to see the pros and cons.
- “Templatize” - Create YOUR own templates for every document that you will be using, based on the above documents, if any, and your experiences in using them. Insert logos, as necessary, and use automated functions in a word processor, presentation or spreadsheet so that minimum change is necessary whenever a request for a document is made.
- Brand it - Keep copies of these templates on a common server for your associates, who can respond to any request from a client or your boss in the exact same way that you do by using the same templates.

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