



**AUM**

**American University Of The Middle East**

# Writing a Formal Report

# Research

- **Primary:**

- interviews
- surveys
- questionnaires
- observation
- unpublished documents

- **Secondary:**

- published material
- catalogues
- handbooks
- brochures
- college websites, etc

# Layout and Design of a Formal Report

## Title Page

The title page contains four main elements:

- **The full title** of the report – informative but not too long
- **The name of the person for whom** the report has been prepared
- **The name of the person(s) who** has written the report
- **The date** the report is issued

# Summary

- The **most important page** in the report – it must be written so as to encourage the reader to read further
- Should be written **after** the rest of the report has been written
- Keep it short, make it interesting and informative
- Keep the intended readers clearly in mind

## Summary Cont.

Use **plain, non-technical words** and avoid jargon

Draw information for the summary from:

1. **the Introduction** (*particularly the purpose of the project*),
2. **the Discussion** (*pick out the most important highlights*) and
3. **the Recommendations** (*the outcome or result of the project*)

# Introduction

- **Usually 1-2 pages**

3 components:

1. The Background
2. The Purpose
3. The Scope

# Background

**The Background** describes events leading up to the existing situation, what projects (if any) have been done previously, and why the project or study is necessary

# Purpose & Scope

- **The Purpose** defines **what** the project or study is to achieve, and **who** authorized it
- **The Scope** outlines any limitations imposed on the project either by the person(s) authorizing it or by the person(s) undertaking it, such as cost, time in which it is to be completed, depth of study, and factors which must be included or may be omitted

# Discussion of Findings

- Major sections with a heading for each – one for each criteria for analysis
- Organize your information
- Include tables, graphics, pictures where appropriate

# Recommendations

- Be brief, and draw your main points from the Discussion
- Be strong, and advocate action
- Use the active voice
- Satisfy the requirements established in the Introduction
- Use bullet points if several recommendations are being made

# References

- You must include a list of references (sources of your information)
- References are numbered and appear in the sequence in which each piece of information is referred to in the report (by endnote)

# Generating Your Own Sources

- Once you have exhausted library and Internet sources, pamphlets and catalogues, you will want to generate some of your own sources – in other words, conduct **primary research**
- Conduct an experiment, survey a group of people, or interview an expert

# Conducting an Interview

- An interview can be especially helpful for a report because it allows you to ask questions precisely geared to your topic
- You can conduct an interview in person, over the telephone, or online using email
- A personal interview is preferable if you can arrange it, because you can see the person's expressions and gestures as well as hear his or her tone and words

☛ Once you have collected all your information, and before you start writing, there are some things you must consider!

# The Report Writing Process

5 steps:

1. Preparing to write
2. Organizing the information
3. Writing the words (draft)
4. Editing the information
5. Revising the text

# Preparing to Write

- Consider your audience
- Determine the “tone” of your report – are you informing or persuading?
- Think about the design of your report

# Design

- Margins – 1inch is standard, but for a bound report, increase the left-hand margin on odd-numbered pages, and the right-hand margin on even-numbered pages
- Page numbers – centered at the foot of the page

- Line Spacing – double for preliminary draft and final draft
- The number of lines between paragraphs – two blank lines between paragraphs when the report is double-spaced
- Paragraph indenting – do not indent the first line of major paragraphs

- Types of Headings: headings provide a visual clue to the importance of information. Use bold letters and a variety of type sizes so that the relative importance of each heading is visible.
- For example:
  - **Major Headings in 18 point Times New Roman**
  - Secondary Headings in 14 point Times New Roman
  - Introductory Headings in 12 point Times New Roman

- Select a simple, well-known type font rather than an exotic one
- Use the **same font throughout** your report, choosing one point size for the text and others for the headings
- Research shows that *serif* fonts such as Times New Roman are easier to read – usually serif fonts are used for longer reports

# Organizing the Information

- Create an outline – even a very basic one – of your report
- Start with listing headings for your major topics and any subheadings that arise

# Writing the Words (Draft)

- Avoid trying to type a perfect first draft – no one expects to produce instantly usable words and sentences that require no further polishing
- Write the report in pieces, treating each section as a mini-report complete in itself – with an introductory section, a development in the middle, and a concluding section
- Avoid editing at this point – wait until you have completed the report sections

## Some Notes on Style

- Write in the First Person – it is not unprofessional!
- Use *I*, *we*, *me*, and *my*

### Instead of:

“The components have been ordered...”

“A data survey was conducted...”

### Try:

“I have ordered the components...”

“We have conducted a data survey...”

# Active Voice

Always use the active voice in your report writing

- A. Carl Dunstan investigated the problem.
  - B. The problem was investigated by Carl Dunstan.
- 
- Which sentence is written in active voice?

- Active Voice: when the person or object performing the action is stated first:
  - *Carl* investigated the problem.
  - *Petra* is studying the charts.
- Passive Voice: when the person or object performing the action is stated *after* the verb:
  - The problem was investigated *by Carl*.
  - The charts are being studied *by Petra*.

- Using the active voice is especially important when making recommendations:
- Passive: “It is recommended that...”
- Active: “I (or we) recommend that...”

# Avoid Cluttering Language

- Use simple words
- Remove words of low information content
  - In order to (replace with *to*)
  - Effect an improvement in (use *improve*)
  - An effort should be made to (replace with *we should*)
  - Located in the vicinity of (use *nearer to*)

# Avoid Overworked Expressions and Clichés

- All things being equal
- At this point in time
- In reference to
- In the long run
- Last but not least
- Needless to say
- Regarding the matter of

# Avoid Gender-Specific Language

Choose gender-neutral terms:

- Chairperson or chair
- Businessperson
- Supervisor
- Technician
- Worker or employee
- Server

# Illustrations

Ask yourself three questions:

1. Which kind of illustration (table, graph, bar chart, flow diagram, photograph, etc.) will best illustrate the particular feature or characteristic I want my readers to comprehend?

2. Will readers be using the illustration simply to **gain a visual impression** of an aspect being discussed, or will they be expected to **extract information** from it?
3. Will the illustration be referred to only once, to amplify or explain a point, or will it be referred to several times in the report? (If it will be referred to frequently, its position needs to be carefully considered).

## Some General Guidelines

Number each illustration sequentially and always refer to it in the report, like this:

.....in Figure 2 the monthly profits for financial year 1999-2000 are compared with those for the two previous years.

Give every illustration a title:

Fig. 2. Financial year 1999-2000 profits compared to two previous years.

Decide where in the report your illustration should appear

- If the illustration is large or extremely complex, insert it as an attachment at the end of the report
- If readers will need to refer to the illustration as they read the report, place it directly in or beside the report text

# Choosing Appropriate Illustrations

## Graphics

- Table
- Bar Chart
- Line Chart

## Objective

- To show exact figures and values
- To compare one item with others
- To demonstrate changes in quantitative data over time

- Pie Chart
- Flow Chart
- Organization Chart
- Photograph, Map, Illustration

- To visualize a whole unit and the proportions of its components
- To display a process or procedure
- To define a hierarchy of elements
- To create authenticity, to spotlight a location, and to show an item in use

**Let's Practise**

# Identify the best kind of graphic to illustrate the following data:

Instructions for workers telling them how to distinguish between worker accidents that must be reported to provincial and federal agencies and those that need not be reported.

Flow Chart

Figures showing what proportion of every provincial tax dollar is spent on education, social services, transportation, debt, and other expenses.

Pie Chart

Data showing the academic, administrative, and operation divisions of a college, from the president to department chairs and division managers.

## Organization Chart

Figures comparing the sales of VCRs, color TVs, and personal computers over the past ten years.

## Line Graph