**PRESENT INFORMATION IN REPORT FORMAT**

**US 110023**

**NQF LEVEL:** 4

**CREDITS: 6**

**NOTIONAL HOURS: 60**



**LEARNER GUIDE**

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| **Name** |  |
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## HOW TO USE THIS GUIDE

This workbook belongs to you. It is designed to serve as a guide for the duration of your training programme and as a resource for after the time. It contains readings, activities, and application aids that will assist you in developing the knowledge and skills stipulated in the specific outcomes and assessment criteria. Follow along in the guide as the facilitator takes you through the material, and feel free to make notes and diagrams that will help you to clarify or retain information. Jot down things that work well or ideas that come from the group. Also, note any points you would like to explore further. Participate actively in the skill practice activities, as they will give you an opportunity to gain insights from other people’s experiences and to practice the skills. Do not forget to share your own experiences so that others can learn from you too.

## ICONS

For ease of reference, an icon will indicate different activities. The following icons indicate different activities in the manual.



**Learning Activities**

**Outcomes**





**Note**

**Note!**

**Reflection**

**References**

**Example**

**Summaries**

**Definition**

**Notes (Blank)**

**Course Material**

**Assessment Criteria**

**Stop and Think!**

## PROGRAMME OVERVIEW

#

## PURPOSE

At the end of this training session you will be able to present information in report format

## LEARNING ASSUMPTIONS

There is open access to this unit standard. The credit calculation is based on the assumption that those starting to learn towards this unit standard have no previous assessment experience. It is assumed, though, that the candidate-assessors have evaluative expertise within the area of learning in which they intend to assess (see Definition of Terms for a definition of "evaluative expertise").

## HOW YOU WILL LEARN

The programme methodology includes facilitator presentations, readings, individual activities, group discussions, and skill application exercises.

## HOW YOU WILL BE ASSESSED

This programme has been aligned to registered unit standards. You will be assessed against the outcomes of the unit standards by completing a knowledge assignment that covers the essential embedded knowledge stipulated in the unit standards. When you are assessed as competent against the unit standards, you will receive a certificate of competence and be awarded 6 credits towards a National Qualification.

##### Assessment Process Flow

**SETA**

**ASSESSMENT**

**CAND**

**I**

**DATE**

Assessment Plan agreed by candidate & completed by the assessor before the actual assessment

Knowledge Questionnaire conducted as per the Assessment Plan

Observation conducted as per the Assessment Plan

Portfolio of Evidence compiled as per the Assessment Plan

A detailed Assessor Report compiled & forwarded for Moderation

Record of Learning Updated

Appeal form completed by the candidate in the event of dispute

Feedback Report Completed by Assessor & individual feedback given to the candidate

Assessment Results Moderated

Action Plan Completed by Assessor

All records & evidence filed

Completed Assessor Report / Moderator Report / Record of Learning

Approval & Certification obtained

Certificate of Competencies issued to successful candidates

Register candidates on the Learner Record Database

Portfolio of Evidence submitted to service provider as per the Assessment Plan

# SECTION 1: INTRODUCTION TO REPORTS

**Specific Outcomes**

Relate the purpose, content, form, frequency and recipients of a range of reports.





**Assessment Criteria**

This specific outcome shall cover:

* The regular reports are identified for a selected organisation.  (SO 1, AC 1)
* The information needs of the organisation are linked to the purpose of each identified report.  (SO 1, AC 2)
* A template is drawn up for each report in the company specific format including the mandatory content headings.  (SO 1, AC 3)
* A table is created listing each report, its purpose, the regular recipients and frequency of distribution. (SO 1, AC 4)
* The created templates are used to write the reports and any necessary modifications are made and noted, to ensure compliance with business requirements.   (SO 3, AC 2)

## 1.1 INTRODUCTION

Communication is one of the key elements that define the ability of the organisation to achieve its mission statement and vision.

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| *Communication is the giving, receiving or exchange of information, opinions or ideas by writing, speech or visual means so that the material communicated is completely understood.* |

From this definition we see that communication is a two-way process - it is not only giving information, opinions or ideas but also receiving such communication from others. There must be complete understanding by both parties involved in the communication process. We must always make sure that our communication is suited to the person receiving it and that it can and will be understood by them.

Communication occurs in the workplace within the boundaries of business ethics. It makes good business sense to communicate in an ethical manner. Business ethics are the principles and norms that serve as a guide for good and bad conduct in business. Your company might have a specific, written code of conduct that acts as the ethical guidelines for employees.

The three main types of communication include;

* Verbal communication
* Written communication
* Non-verbal communication

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| **WRITTEN COMMUNICATION**Written communication would include everyday interaction in document format to one person, a group or an organisation in paper-based or electronic formats.* Letters
* E-mail
* Meeting documents
* Reports
* Forms, etc.
 |

**1.1.1 DEFINITION OF BUSINESS REPORTS**

A business report is a formal document in which a summary is given of fact, progress, investigation or enquiries. Reports are used internally to give feedback on the progress of any task that may have been delegated. They have a standard format but are more detailed.

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| A report can be written on; | * The results of a marketing campaign,
* the progress in any department,
* quality control on a new product or
* Even on an assessment of staff members.
 |

1.1.2 REASONS FOR REPORT WRITING

Generally reports are written for the following reasons;

* to enable us to keep records;
* to inform all interested South Africans;
* to tell about failures and successes;
* for ourselves, to keep on knowing what we are doing;
* to communicate to others e.g. our managers, funders/shareholders etc
* so other people can be encouraged to do their own projects/job/tasks;
* so other people can learn what we did;

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| Reports deliver* Facts
* Assessment of a situation
* Recommendations
* Communicate information
 |



## 1.2 REGULAR BUSINESS REPORTS (SO 1, AC 1)

The following are the common reports in the business environment (this list is not exhaustive).

* Progress reports;
* Recommendation justification report
* Trip reports; and
* Meeting reports.
* Incident report
* Performance report

1.2.1 PROGRESS REPORTS

A progress report refers to any routine progress report: monthly, bimonthly, quarterly, bi-annual or annual. This type of a report is different from a situation report (sitrep) in that a sitrep merely states what has happened and what was done about it during the reporting period. A progress report, in contrast, relates activities to objectives or results.

A good progress report is not merely a descriptive activity report, but must analyse the results of those reported activities. The analysis should answer the question, "How far have the objectives been reached.

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| In the progress report, you explain any or all of the following: * How much of the work is complete
* What part of the work is currently in progress
* What work remains to be done
* What problems or unexpected things, if any, have arisen
* How the work or task is going in general
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| Report type | Purpose | Possible recipients | Frequency |
| Progress report | * Reassure recipients that you are making progress, that the work is going smoothly, and that it will be complete by the expected date.
* Provide their recipients with a brief look at some of the findings.
* Give their recipients a chance to evaluate your work and to request changes.
* Give you a chance to discuss problems in a task or work and thus to forewarn recipients.
* Force you to establish a work schedule so that you'll complete the work on time.
 | * Supervisor
* Manager
* Team leader
* Director
 | Frequency range from* Daily
* Weekly
* Monthly
* Quarterly
 |

Format of a progress report

A progress report must include the following headings

1. Background
2. Activities completed
· Final against plan (data)
· Learning to be shared
3. Activities in process
· Status against plan (data)
· Issues/concerns

. Recommendations/implications/conclusions

1. General progress of activities (appraisal)





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| TIPS FOR REPORT WRITING* Make sure you use the right format. Remember, the memo format is for internal progress reports; the business-letter format is for progress reports written from one external organization to another. (Whether you use a cover memo or cover letter is your choice.)
* Write a good introduction-in it, state that this is a progress report, and provide an overview of the contents of the progress report.
* Use headings to mark off the different parts of your progress report, particularly the different parts of your summary of work done.
* Use lists as appropriate.
* Provide specifics-avoid relying on vague, overly general statements about the work you've done.
* Be sure and address the progress report to the real or realistic audience-not your instructor.
* Assume there will non specialist reading your progress report. But don't avoid discussion of technical aspects of the project—just bring them down to a level that non specialists can understand.
 |

1.2.2 BUSINESS TRIP REPORT

[Business](http://www.ehow.com/business/) trip reports are a widely used element of organizational communication. They are usually sent to a supervisor or to a group of associates to describe a business trip.

A field trip should have;

1. Accurate memorandum heading. This must include:
	* To whom the memo is addressed,
	* the memo's author,
	* the subject of the memo and
	* The date it is written.
2. Short introduction-a paragraph will do-stating the purpose of your memo. Describe the reasons for the trip, and explain what you hoped to achieve from it. Include whatever background information your readers need to understand the context of your trip and the reason you are writing the memo. For instance, mention where you travelled. If you went to a seminar, mention who the keynote speakers were; if you went to a business meeting, specify which company you met with and the subject of the meeting.
3. Summarize your trip. If it was a fact-finding trip, describe what your findings were. If it was a seminar, review the highlights. Do not provide a tedious minute-by-minute record of your trip; nobody wants to hear the boring details. For example, do not include extensive notes on every talk or meeting

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| **NOTE**There's no need to describe the five-course meals you had, or how beautiful the view from your hotel room was.  |

1. State any information about the trip that is relevant to your line of work or research. Include here any recommendations you want to share with your readers.

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| **REMEMBER**A field trip report should emphasize the results of that trip. * Did you achieve your purpose?
* To what extent?
* Why?
* What unexpected observations did you make?
* What consequences do those observations have?
* Have you observed indicators of any results of previous projected activities?
* Should any project objectives be modified from what you observed? Did you identify any new problems?
* Did you come to any new conclusions, alone or in discussion with some of the persons you met or meetings you attended?
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| Report type | Purpose | Possible recipients | Frequency |
| Business trip report | The purpose of writing a business trip report is to give an overview of what was transpired during the trip. | * Supervisor
* Manager
* Team leader
* Director
 | After every business trip |

**FORMAT OF A BUSINESS TRIP REPORT**

These reports follow a basic memorandum format with a header, statement of purpose, discussion and recommendations.

The following headings must be available in a trip report

1. Background
2. Date of trip/destination
3. Purpose of the trip
4. Background
5. Details
· Who
· What
· Findings/results
· Implications
6. Conclusions/recommendations
7. Attachments

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| **CLASS ACTIVITY**Comment on the following sample business trip report**Sample Trip Report**To:From:Subject: Vanguard Communications/Incoming Calls Management Institute SeminarOn (date) I attended a seminar in (location) which was sponsored by Incoming Calls Management Institute. The name of the seminar was "Understanding and Applying Today’s Call Center Technologies.” The seminar leader was (Lori Bocklund/Dave Bengtson/Don Van Doren), a consultant with Vanguard Communications Corporation.We talked about strategic alignment – how important it is that our call center technology enable our call center strategy, which supports our business strategy. We looked at the customer contact challenges presented today. We must use multiple media and build relationships with customers – not just service their needs over the telephone.We learned the “why, what, how, who, when” of a broad array of call center technologies, from basic functions to advanced tools. We started with a discussion about infrastructure - application architectures, and network architectures. We talked about some of the emerging architectures that move intelligence outside of the switch, and leverage Internet Protocol (IP) for voice switching. We talked about capabilities for routing and reporting, at both basic and advanced levels. We also looked at advanced management tools such as workforce management systems, simulation tools, and quality and logging systems. We talked about self service via voice response and the web, and the powerful business case it can have with the right application opportunities. We discussed things like conditional and skills based routing, networking sites, Computer Telephony Integration (CTI), and Customer Relationship Management (CRM) systems. The advanced technologies will help us move from using the call center as a tactical resource, to positioning it as a strategic element in customer relationship management. And they’ll help us to lower our costs of doing business, while delivering better service to our customers.We looked at the specific capabilities of each technology, as well as the business challenges it addresses. For each one, we discussed the major vendors and how their offerings varied. Our materials packet included a handout listing vendors by category, along with their corporate URLs. There is also a valuable resource list with on-line learning centers, magazines, conferences, organizations, and other sources to turn to. Updates to this will be available to us ongoing at www.vanguard.net.The instructor explained how the various technologies work together, and how different configurations could address similar issues. We also talked about the benefits to the company, the call center supervisor or manager, the CSR, and of course, the customer.We had group exercises to apply what we were learning, and a lot of good discussion among the class members. In addition to the materials already mentioned, the course packet included a number of other useful takeaways, including a glossary, a “what fits where” table to help identify when to use different technologies, Call Center and Voice Response Best Practices and Trends, and a planning and implementation toolkit.I think this course (was/was not) worth attending because (your reasons). I (would/would not) recommend that others from our (company/organization) attend. I learned a lot about the many call center technologies and have new ideas about why they make sense in our business and what we should do next. I would like to meet with you to discuss how we can use some of the helpful tools to get started on our strategic call center direction here at (your company). |

1.2.3 INCIDENT REPORT

Whether you work in a public area or a place of [business](http://www.ehow.com/business/), when something unusual occurs most [businesses](http://www.ehow.com/business/) and insurance companies require an incident report to be filed. An incident report is simply a written statement of the events and how they occurred. It isn't hard to write an incident report, but there are a few things you should know that will help you to write a good one.

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| Examples of events where an incident report can be written include but are not limited to the following:* Injury to individual or caused to others;
* Aggressive behaviour directed at others;
* Self abusive behaviour;
* Endangering or threatening others;
* Serious illness and/or hospitalization;
* Imminent death or death;
* Property destruction;
* Serious disruptive situation while in the community;
* Illegal or unusual problematic behaviour;
* Being victimized by another individual who receives services;
* Any incident involving the police, fire department, ambulance etc.
* Any time someone has physically intervened with an individual when such intervention is ***not*** in accordance with an approved behavioral treatment plan;
* Any time an individual is involved in an automobile accident while receiving services;
* Being a victim of a crime reported to a law enforcement agency;
* Being incarcerated (in jail or prison for at least one overnight stay);
* Significant accomplishments or other positive changes which should be noted by others.
 |

**NB**

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| Incident Reports are legal documents which may be viewed by the individual, his/her guardian, designee or legal representative and may be utilized by courts. |

**Purpose**

1. The purpose of incident/ hazard reporting is to ascertain the root causes of the incident/hazard which will
* prevent any incident that may result from the hazard,
* correct the problem to prevent a recurrence
* Obtain data which will allow trends to be measured and programs implemented to reduce risk.
1. To [document](http://en.wikipedia.org/wiki/Document) the exact details of the occurrence while they are fresh in the minds of those who witnessed the event.
2. Formulating plans or profiles, to develop support strategies and when making decisions.

**FORMAT OF AN INCIDENT REPORT**

The following are some of the main contents of an incident report;

|  |
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| 1. **Aims & Objectives -** Tell the reader what you were trying to do in the investigation/incident (e.g. “The investigation was designed to get to the root causes of the fire in the Loading Dock”) and what you hoped to achieve by doing it (e.g., “We intend, by addressing those root causes, to prevent similar and related incidents happening in the future”).
2. **Incident Description** - Describe precisely what happened, beginning with the initial incident statement and resisting the temptation to launch straight in with underlying or root causes or inappropriate detail. They come later. At this stage you should be objective (e.g. Incident Statement - “Train ran off rail. Damage to property and potential injury.”). The Incident Description expands on that adding the rest of the detail which is known to be true.

Make sure you cover the Who, What, When and Where in your description, and add any significant and immediately striking factors which are known to be true. But this is not the place to go into your methods of investigation or your findings. They come next.1. **Methods of Investigation** - Begin this section by describing your investigation team: who it was made up of, their qualifications, their positions and anything else relevant about them. Next, detail any site visits you made. Attach any photographs, diagrams or drawings you may have — but remember: many people aren’t skilled at reading engineering drawings or technical diagrams, and they may need some explanation.
2. **Findings** - This section is - as you’d expect - where you set out your findings. There are plenty of perfectly good ways of keeping your findings in some sort of logical order. The main thing is not to jump around all over the place like a cheap detective story; that just confuses. We find that ordering our findings in accordance with the TOP-SET® headings is extremely helpful:

**T** ime / **O** rganisation / **P** eople / **S** imilar events / **E** nvironment / **T** echnology1. **Recommendations.** In this fuller version, you will want to address not only the root causes but also all the individual contributory causes you found along the way; they have to be dealt with also. In any case, once again, we suggest you tie in your recommendations to your findings and classify them under the TOP-SET® headings / sub-headings, for clarity’s sake.
 |

**Writing incident reports**

In writing an Incident Report, all aspects of the incident must be carefully considered, especially the data. Incident data must be carefully constructed and used. Collecting data for an Incident Report often involves significant research including interviews of those involved and eyewitnesses, ascertaining damage, liability assessments, looking at reports others have written, and much more. When writing an incident report, the author must consider whether the data is

* appropriate to the incident
* accurate
* carefully interpreted and without bias
* Appropriately presented in words as well as in graphic format (graphs, tables, diagrams, etc.)

1.2.4 MEETING REPORTS

All meetings, of course, should have a purpose, and the purpose must be related to achieving the objectives of the project. Reports on those meetings, therefore, should concentrate on the purpose and indicate the result of the meeting in terms of progress towards meeting those objectives.

Format of a meeting report

Below is a report format that can be used for writing a meeting report.

1. Purpose/agenda of the meeting
2. Date, place, time of the meeting
3. Background of the meeting
4. People present
5. People absent( reasons if important)
6. Issues discussed.
7. Suggestions.
8. Findings.
9. Outcome.
10. Pending issues.
11. Action items.

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| **NOTE**Points to remember when writing a meeting report:* Do your homework about the agenda of the meeting.
* Write the report as soon as possible, immediately after the meeting, in order to include all important aspects of the meeting in the report.
* Ensure clear and simple presentation and language.
* Use a laptop or a pen and paper depending on your comfort level.
* Avoid writing down everything.
* Be attentive during the meeting.
* Utilize the agenda as an outline for the report.
* Avoid making the report lengthy by adding all the details.
* Keep it precise and articulate.
* Avoid giving opinions or comments as asides.
* Report the decisions and findings.
* Use bullet points
* Use each point to signify a different finding, decision or objection as the case may be.
* Nested bullets could be used to include subtopics to a main topic.
* Highlight issues that are pending and have been postponed to the next meeting.
* Mention the action items (tasks to be undertaken, as a result of the meeting) decided at the end of the meeting and names of the people, if any, who will be in charge of them.
* A god meeting report has zero typographical or spelling errors.
* Make sure you check the spelling as well as the grammar of the report before sending it out.
 |

**1.2.5 RECOMMENDATION /JUSTIFICATION REPORT**

Justification reports are written to defend changes in policy or procedure. They are often written without any request from the reader. The report focuses on answering the question “why should we?” Do this by providing supporting evidence and convincing arguments to back the changes your report proposes.

**Steps when writing Recommendation justification report**

* Use a basic memo heading (To/From/Date/Subject) and fill it in. Make it clear who should read the report, who wrote it, and what the content subject is.
* Write an opening paragraph that describes the problem or purpose of your report. Explain in a few sentences what your recommendations are, and explain the benefits they will bring.
* Write an introduction to your report that details the purpose and significance of your report in more detail. Include relevant background information that will help the reader understand the motives and reasoning behind your recommendations.
* Use the main body of your report to explain how you suggest implementing your recommendations. Provide specific details about the new procedures or solutions. Explain who will be involved, what they will do, what it will cost, and how long it will take to carry out. State the research or the methods you followed to arrive at your conclusions. Include the disadvantages and problems the new procedures might create. Be precise, organize your material logically, and be fair; this will add force to your arguments.
* Finish your justification report with a brief summary of your conclusions and recommendations. Do not introduce new information at this stage; instead review the main arguments in support of your recommendations. Write a brief closing paragraph for your memo.

**1.2.6 PERFORMANCE REPORT**

These reports evaluate productivity and recommend courses of action to improve employee productivity. Most organisations have their own performance evaluation systems and formats. Sometimes these reports are linked to bonus or other reward systems.

Let us look at the steps in writing performance reports. Follow the tips given below to ensure writing performance reports that are well drafted.

**1. General Performance Evaluation**

Every organization has a list of policies and regulations for employees to follow. While learning how to write a performance reports, it is important that you keep these policies in mind. These will provide you with the key performance indicators that an organization takes into account and help you grade an employee’s performance effectively. In addition, the policies of an organization helps define different indicators like punctuality, time management, discipline, and professionalism.

**2. Rating System**

As a performance evaluator, it may be a good idea to follow some form of a rating scale that helps you define performance objectively. A rating system is also a good way to compare and contrast employee reviews and to remain consistent and objective while doing so. Define how you will grade or scale the performance and what are the key indicators that will determine the grading system. Have a numerical scale rating performance between 1 to 5. You can also have a system that grades performance between bad, average, above average, good, and excellent. Follow specific guideline while grading an employee’s performance. Include a SWOT analysis of the employee to identify their strengths and weaknesses. This can be an effective way of improving performance.

**3. Performance Evaluation**

While learning how to write a performance reports, it is important that you summarize every performance area well, so that during a face to face meeting with the employee being reviewed you have specific details to back up every claim that you have made. If there are negative performance review phrases that have been included, then back these up with solutions to improve on these problems and to motivate the employees to perform better. Include details about any additional projects that were taken up by the employee and evaluate their performance on them. While writing performance reviews it is important that you maintain an objective point of view regardless of your personal biases.

## 1.3 INFORMATION NEEDS FOR ORGANISATIONS (SO1,AC 2)

Regardless of the size of an organisation, all organisations require information. This information can be collected from a wide variety of sources including reports. The following are the benefits of information to an organisation;

* The main benefit of better information for most organisations will be to help meet the needs of users and clients. This is the central purpose for most organisations and better information will help them to improve their service to the public.
* Information that helps people avoid problems in the first place can help reduce the demand on advice services and the justice system. Similarly, information that encourages people to take action earlier will stop problems escalating, reduce the complexity of problems taken to advice agencies, and ease the load on tribunals and courts.
* Where better information increases people’s capacity to deal with problems effectively, it will help more capable individuals achieve satisfactory outcomes themselves, and help everyone use advice and support services more efficiently.
* More precision in producing information and more accuracy in targeting will increase the effectiveness of what is produced. This will produce better outcomes for priority groups and reduce the waste of an unfocussed approach.
* Good information can promote an organisation and its services. Many organisations, both government bodies and those in the independent sector, would benefit from increasing their profile and improving public understanding of the services they provide.
* Better information about process and procedures, such as how to access and use services like courts and tribunals, will reduce pressure on staff and lead to greater efficiency and reduced costs for these organisations.

**Information needs**

Information needs for an organisation vary from one management level to the other. Let us begin with information needs for the top management;

**A. Top management**

* General economic variables, especially if the business is doing business globally. These can include information on the value of the Rand against other currencies; and the interest rates.
* Competitors in the market. The top management need to know how strong the competition is and what they are doing regarding marketing and product strategies.
* Government Acts and Legislation. Depending on the nature of the industry, changes in legislation affect business operations.

**B. Functional managers**

Functional managers need information to enable them to assist top managers in planning, development and implementation of policies as well as manage their individual functions. The following are examples of information that they need,

|  |  |
| --- | --- |
| **Function** | **Information needed** |
| Marketing | * Clients and potential clients in the market: number, tastes, preferences, opinions, expenditure patterns, and needs.
* Competitors: their products, price, and promotional strategies.
* Budgeted and actual sales quantities
 |
| Operations | * Operational costs
* Progress made in current tasks delegated.
* Stock quantities
* Suppliers and potential suppliers
 |
| Human resources | * Staff needs
* Training statistics
* Merit assessment results
* Training needs
* Industry based salary scales
* Working conditions
 |
| Finance | * Turnover
* Operating costs
* Investment opportunities
* Capital movements
* Creditors and debtors
 |

As we have mentioned before, reports are a source of information for both top and middle managers in any organisation. Let us look at how the purpose of a report is related to the information needs of an organisation.

|  |  |  |
| --- | --- | --- |
| **INFORMATION NEEDS FOR THE ORGANISATION** | **NAME OF REPORT** | **PURPOSE** |
| * How much of the work is complete
* What part of the work is currently in progress
* What work remains to be done
* What problems or unexpected things, if any, have arisen
* How the work or task is going in general
 | Progress report | It is a report which provides information on the status of tasks delegated to employees. |
| If an employee goes on a trip the information needs are;* Was the purpose achieved?
* To what extent?
* Why?
* Unexpected observations or challenges observed?
* Consequences of the challenges?
* Recommendations?
 | Business trip report | This is a report which gives information about a business trip. |
| In the case of an incident, the informational needs are;* What happened?
* Where it happened?
* Who was involved?
* Why did it happen?
* When did the incident happen?
* What was done if any to address the incident?
 | Incident report | The purpose is to provide a written statement of the events and how they occurred |
| For any meeting that occurs in the organisation, the management requires the following;* Purpose/agenda of the meeting
* Date, place, time of the meeting
* Background of the meeting
* People present
* People absent( reasons if important)
* Issues discussed.
* Suggestions.
* Findings.
* Outcome.
* Pending issues.
* Action items.
 | Meeting report | This is a report on a meeting. The main purpose is to give feedback on issues discussed and how the resolutions shall help the organisation to move forward. |
| * What is the problem
* How bad is the problem
* What are the options of solving the problem?
* Which one is the best option and why.
 | Justification report | The purpose of a justification report is to provide supporting evidence to support a particular option. |
| * Tasks that were undertaken
* Performance measure
* Outcomes or outputs
* Rating
* Recommendations made
 | Performance report | The main purpose of this report is to provide feedback to the employee and superiors about the performance of an individual over a given time period. |

## 1.4 REPORT TEMPLATES (SO 1, AC 3, SO 3, AC 2)

Organisations have set templates for writing different types of reports.

|  |
| --- |
| **PROGRESS REPORT TEMPLATE**NAME OF REPORT WRITER *(mandatory)* .............................................................................DEPARTMENT.....................................................................................................................EMPLOYEE No (optional)......................................................................................................RECEIVER OF THE REPORT *(mandatory)*.............................................................................DATE...................................................................................................................................**1.INTRODUCTION *(mandatory)***................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................**2. DESCRIPTION OF TASK (BACKGROUND, OBJECTIVES, TARGET DATES *(mandatory)***......................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................**3. WORK COMPLETED TO DATE*(mandatory)***3.1 TASK 1.................................................................................................................................3.2 TASK 2...............................................................................................................................3.3 TASK 3...............................................................................................................................**4. DIFFICULTIES ENCOUNTERED*(mandatory)***......................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................5. NEXT PHASE***(mandatory)***...................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................6. CONCLUSIONS AND RECOMMENDATIONS***(mandatory)***..................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................7. SIGNATURE ***(Optional)*** ......................  |

|  |
| --- |
| **BUSINESS TRIP REPORT** |
| REPORT WRITER (mandatory) |  |
| DEPARTMENT (optional) |  |
| EMPLOYEE No (Optional)  |  |
| DATE (Mandatory) |  |
| 1. INTRODUCTION ***(mandatory)***.........................................................................................................................................................................................................................................................................................................................................................................................................................................................................2.PURPOSE OF THE TRIP***(mandatory)***.....................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................................3. EXTENT TO WHICH THE PURPOSE WAS ACHIEVED ***(mandatory)***........................................................................................................................................................................................................................................................................................................................................................................................................................................................................4. UNEXPECTED OBSERVATIONS MADE ***(mandatory)***........................................................................................................................................................................................................................................................................................................................................................................................................................................................................5. CONSEQUENCES OF THE OBSERVATIONS MADE ***(mandatory)***.......................................................................................................................................................................................................................................................................................................................................................................................................................................................................6.RECOMMENDATIONS ***(mandatory)***.......................................................................................................................................................................................................................................................................................................................................................................................................................................................................SIGNATURE (optional)............................. |

|  |  |
| --- | --- |
| **PP 2000-BLK** | **Incident / Unusual Occurrence****Report Form** |

|  |  |
| --- | --- |
| Date of Incident / Unusual Occurrence: | Time: |
| Place of Incident / Unusual Occurrence: | Contact Name: |
| Address: | City: |
| State/Zip: | Phone Number: |
| Reported By: | Phone Number: |
| Reported To: | Phone Number: |

|  |
| --- |
| **State the facts** of *Who, What, Where, When, Why, and How* the incident / unusual occurrence happened? |
|  |
|  |
|  |
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|  |
|  |
|  |
|  |

|  |
| --- |
| Witness(es) |
| Name: | Name: |
| Phone: | Phone: |
| Comments: | Comments: |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| Who was involved?  | [ ]  Pet Partner Handler [ ]  Pet Partner Animal[ ]  Non-Pet Partner Handler [ ]  Non-Pet Partner Animal[ ]  Client [ ]  Staff [ ]  Team Evaluator [ ]  Pet Partner Instructor[ ]  Other:    |
| Did the incident / unusual occurrence occur during a visit?  |  [ ]  Yes [ ]  No  |

|  |  |
| --- | --- |
| Name of Individual Report filed on: | ID# (If Applicable): |
| Address: | City: |
| State: | Zip Code: |
| Phone: | Email: |
|  Individual is a:(check all that apply) | [ ]  Pet Partner Handler [ ]  Pet Partner Animal[ ]  Non-Pet Partner Handler [ ]  Non-Pet Partner Animal[ ]  Client [ ]  Staff [ ]  Team Evaluator [ ]  Pet Partner Instructor[ ]  Other:  |
| Animal’s Name (if applicable): | Species: Breed: |

|  |  |
| --- | --- |
| Name of person(s) involved in incident / unusual occurrence: |  |
| Did incident involve apparent injuries?  | [ ]  Yes [ ]  No  |
| **Complete the following section *only* if an injury occurred.** |  |
| Was first aid given?: |  |
| Who administered first aid? |  |
| Did the person(s) or animal(s) involved in the incident resume his/her/their activities? | [ ]  Yes [ ]  No  |
| If no, please explain: |  |
| Was further medical treatment required? | [ ]  Yes [ ]  No |
| Did person need to consult with a doctor? | [ ]  Yes [ ]  No |

|  |
| --- |
| **RN or MD Evaluation (if available):**  |
| Please describe injury: |
| Will further medical treatment be required? |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ RN or MD Signature Date  |

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Reported by: Name (Printed) Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Person Involved (Printed) Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address of Person Involved Phone Number

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Witness #1 (Printed) Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Witness #2 (Printed) Signature Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Facility Supervisor (Printed) Signature Date

(if applicable)

Delta Society will endeavour (make every effort) to promptly obtain a report from (by) all parties involved as appropriate. Delta Society will investigate and determine a course of action. Please allow 2 to 4 weeks for Delta Society to complete the process. In some rare cases it may take over 4 weeks due to the complexity of the report and number of parties involved.

**Note:** Pet Partner activities/visits may be put on hold until the investigation has been completed. Serious violations may result in termination from the Pet Partners program.

|  |  |  |
| --- | --- | --- |
| **Please return this form to:**  | Rachel WrightDelta Society®875 124th Ave. N. E.Suite 101Bellevue, WA 98005 | Questions?Phone: 425-679.5506FAX: 425-679-5539Email: petpartners@deltasociety.org  |

|  |
| --- |
| **For Delta Society Office Use Only** |
| Date Delta Society received report: | Date Report Filed: |
| Action Taken: |  |
|  |  |
| Delta Society Staff Signature/Date: |  |

Source: [www.petpartners.org/**document**.**doc**?id=62](http://www.petpartners.org/document.doc?id=62)

**EMPLOYEE PERFORMANCE REPORT**

|  |  |
| --- | --- |
| Employee: | Position No. |
| Title: | ❑ Annual |
| directorate: | ❑ Orientation |
| Unit/ Division: | ❑ Interim  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Employment Date: |  | Date of Job Change or Probation: |  | Evaluation Date: |  |

Departments are required to establish a system of performance evaluations for staff employees that reflect an impartial rating of each staff member’s performance and potential for further advancement. Appraisals can be a positive means to assist the staff member in improving job performance.

Staff performance evaluations should be conducted on a periodic basis (at least annually) and should not reflect personal prejudice, bias, or favoritism on the part of the supervisor for the rating or review. It is important to be positive in all evaluation meetings. Remember performance is being measured, not the employee’s value as a person. Also, remember the employee must know what is expected in job performance and production in order to meet the expectations.

**Form Instructions**

1. Both the employee and the supervisor should have a copy of the current job description.
2. If you wish to have the employee participate in self-evaluation, provide a copy for the employee to use as a worksheet. Allow enough time for thoughtful review. Self-evaluation is helpful in stimulating discussion of ways in which supervisor and employee can work together to increase effectiveness.
3. Use one of the following ratings to describe the performance of the individual in each of the categories.
4. ALL FIELDS ARE MANDATORY

|  |  |
| --- | --- |
| Target Rating scale | Is a standard scale for rating an employee’s performance in relation to specific categories of performance. These are often used to introduce a degree of comparability into systems for performance assessment. A rating scale of 1 – 5 is used to determine the extent to which a target has been achieved. The details of the rating scale are as follows: |
| **5** | Outstanding performance: Performance far exceeds the standard expected of an employee at this level.  |
| **4** | Performance significantly above expectations: Performance is significantly higher than the standard expected in the job.  |
| **3** | Fully effective: Performance fully meets the standards expected in all areas of the job.  |
| **2** | Performance not fully effective: Performance is below the standard required for the job in key areas. Performance meets some of the standards expected for the job.  |
| **1** | Unacceptable performance: Performance does not meet the standard expected for the job. The employee has failed to demonstrate the commitment or ability to bring performance up to the level expected in the job despite management efforts to encourage improvement. |

1. When giving a rating of 5 or 1, the Evaluator must provide an explanation for that rating in the comments section for that category. Use the back of the form or an additional page if necessary.
2. All ratings in each category should be averaged together and listed in the comments section for that category. The final rating is the average of all category average ratings and may be reported as a number with two decimal places. Items that are not applicable (NA) should not be used to calculate the average rating for that category.
3. Supervisor and employee must discuss the evaluation, progress made in performance, and progress toward objectives and goals for the coming year. Both the supervisor and employee must sign the form and both must have an opportunity to add comments.
4. All ratings are reviewed and approved by the next-higher-level supervisor than the one who prepared the rating.
5. The original form with the final ratings, comments and signatures is retained in the employee’s file in the department. The employee signs the form to acknowledge that s/he has seen the report and has been apprised of his/her evaluation.
6. The employee has a right to make a written statement or rebuttal on the form at the time of the evaluation and/or within ten working days. If a statement is submitted within ten days, it will be attached to the evaluation report. Supervisors should make employees aware of this opportunity.
7. A copy of the signed evaluation shall be provided to the employee within 30 days of the date of the evaluation or upon request.

**factor ratings:**

5 = Performs exceptionally well; 4 = Performs very well; 3 = Performs well; 2 = Needs improvement;
1 = Unsatisfactory; NA = Not Applicable

**Any rating of 5 or 1 requires an explanation for that rating in the comments section**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **I. JOB KNOWLEDGE / TECHNICAL SKILLS** | 5 | 4 | 3 | 2 | 1 | NA |
| a) Understands & performs assigned duties and job requirements |  |  |  |  |  |  |
| b) Uses techniques, materials, tools & equipment effectively |  |  |  |  |  |  |
| c) Follows procedures |  |  |  |  |  |  |
| d) Stays current with technology and job-related skills |  |  |  |  |  |  |
| e) Works in a safe manner |  |  |  |  |  |  |
| Comments Average Rating:  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **II. QUALITY / QUANTITY OF WORK** | 5 | 4 | 3 | 2 | 1 | NA |
| a) Sets and adheres to priorities |  |  |  |  |  |  |
| b) Meets established productivity standards, deadlines and work  schedules |  |  |  |  |  |  |
| c) Uses resources efficiently and economically |  |  |  |  |  |  |
| d) Accomplishes accurate work with minimal assistance or supervision |  |  |  |  |  |  |
| e) Provides work products and services that consistently meet the needs and expectations of both internal and external customers |  |  |  |  |  |  |
| Comments Average Rating:  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **III. INITIATIVE / JUDGMENT** | 5 | 4 | 3 | 2 | 1 | NA |
| a) Takes effective action without being told |  |  |  |  |  |  |
| b) Analyzes problems and suggests effective solutions |  |  |  |  |  |  |
| c) Demonstrates willingness to learn new skills |  |  |  |  |  |  |
| d) Develops realistic plans to accomplish assignments |  |  |  |  |  |  |
| Comments Average Rating:  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **IV. DEPENDABILITY / SELF-MANAGEMENT** | 5 | 4 | 3 | 2 | 1 | NA |
| a) Demonstrates punctuality and begins work as scheduled |  |  |  |  |  |  |
| b) Contacts supervisor concerning absences on a timely basis |  |  |  |  |  |  |
| c) Can be depended upon to be available for work |  |  |  |  |  |  |
| d) Manages own time effectively |  |  |  |  |  |  |
| e) Accepts responsibility for own actions and ensuing results |  |  |  |  |  |  |
| f) Demonstrates commitment to service |  |  |  |  |  |  |
| Comments Average Rating:  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **V. COMMUNICATION / TEAMWORK** | 5 | 4 | 3 | 2 | 1 | NA |
| a) Understands the organization’s policies, procedures, goals and purpose as required for the job |  |  |  |  |  |  |
| b) Promotes and demonstrates trust, mutual respect and a cooperative work environment |  |  |  |  |  |  |
| c) Conveys work-related information and ideas to others in oral and/or  written communications effectively |  |  |  |  |  |  |
| d) Offers assistance, is courteous and works well with customers and  fellow workers |  |  |  |  |  |  |
| e) Supports cultural diversity in the workplace |  |  |  |  |  |  |
| Comments Average Rating:  |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **VI. INNOVATION / CHANGE** | 5 | 4 | 3 | 2 | 1 | NA |
| a) Is receptive to new ideas |  |  |  |  |  |  |
| b) Adapts to new situations and changes in the work environment |  |  |  |  |  |  |
| c) Identifies opportunities to improve work processes |  |  |  |  |  |  |
| d) Demonstrates creativity and contributes new ideas |  |  |  |  |  |  |
| Comments Average Rating:  |

**ADDITIONAL JOB FUNCTION SPECIFIC TO POSITION (OPTIONAL)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | 5 | 4 | 3 | 2 | 1 |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
| Comments Average Rating:  |

## 1.5 REPORT, PURPOSE, RECEPIENTS AND FREQUENCY OF DISTRIBUTION (SO 1, AC 4)

|  |  |  |  |
| --- | --- | --- | --- |
| **NAME OF REPORT** | **PURPOSE** | **RECEPIENTS** | **FREQUENCY OF DISTRIBUTIN** |
| Progress report | It is a report which provides information on the status of tasks delegated to employees. | * Team leaders
* Supervisors
* Line managers
 | Depends on the nature of the task. It can be after every week, 3 weeks etc |
| Business trip report | This is a report which gives information about a business trip. | * Superior manager
 | After every business trip |
| Incident report | The purpose is to provide a written statement of the events and how they occurred | * Superior manager
* Investigator
* police
 | After every incident  |
| Meeting report | This is a report on a meeting. The main purpose is to give feedback on issues discussed and how the resolutions shall help the organisation to move forward. | * Superior manager
* Meeting participants
 | After every meeting |
| Justification report | The purpose of a justification report is to provide supporting evidence to support a particular option. | * Superior manager
 | As and when required |
| Performance report | The main purpose of this report is to provide feedback to the employee and superiors about the performance of an individual over a given time period. | * Superior manager
 | Once every year. |

|  |
| --- |
| **CLASS ACTIVITY**1. Explain the reasons why organisations write reports.
2. Identify any 7 reports written in your organisation and explain their purpose.
3. Identify the information needs of any 3 internal stakeholders in your organisation.
 |

# SECTION 2: COLLECTION OF INFORMATION FOR REPORT WRITING

**Specific Outcomes**

Identify information sources & organisational procedures for obtaining & distributing information.





**Assessment Criteria**

This specific outcome shall cover:

* The identified information sources are used to provide the information required by the organisation. (SO 3, AC 3)
* A table is created listing each report and the information sources required for input to the report. The information sources are linked to specific headings within the report.  (SO 2, AC 1)
* A table is drawn up listing each information source, from whom it is obtainable, when it is available, its level of confidentiality, and to whom it should be returned.   (SO 2, AC 1)
* Company procedures for obtaining information sources are identified for each information source and linked to the table above.   (SO 2, AC 3)

## 2.1 INTRODUCTION

Information source is the supplier of [information](http://en.wikipedia.org/wiki/Information) for a certain individual, i.e. anything that might inform a person about something or provide knowledge to somebody. Information is a prerequisite when writing reports because reports must be objective and factual in their content.

## 2.2 SOURCES OF INFORMATION (SO 3, AC 3)

The main sources of information are;

* Primary and
* Secondary source

These two sources of information provide useful information when writing reports.

2.2.1 PRIMARY INFORMATION

Primary information is the data that originates as a result of that particular investigation. Jankowicz (1995) asserts that data are mainly primary if they have been gathered according to your own rationale, and interpreted by yourself, to make a point which is important to your own argument: in other words, if they are relatively original. Primary information is pertinent in reports as a was of substantiating it. The following are the common sources of primary data;

1. **Questionnaires**

This is the structured technique of collecting primary data. Questionnaires are an inexpensive way to gather data from a potentially large number of respondents. Often they are the only feasible way to reach a number of reviewers large enough to allow statistically analysis of the results.

A questionnaire has the following advantages:

1. It allows free style of investigation and pursuing particular issues in greater detail.
2. It is quick to collect information using a questionnaire.
3. Allows potential information to be collected from a large portion of a group.

Questionnaires make use of open and closed ended questions;

* Open format questions are those that ask for unprompted opinions. In other words, there are no predetermined set of responses, and the participant is free to answer however he chooses. Open format questions are good for soliciting subjective data or when the range of responses is not tightly defined. An obvious advantage is that the variety of responses should be wider and more truly reflect the opinions of the respondents.

|  |
| --- |
| **WHEN TO USE A QUESTIONNAIRE?**There is no all encompassing rule for when to use a questionnaire. The choice will be made based on a variety of factors including the type of information to be gathered and the available resources for the experiment. A questionnaire should be considered in the following circumstances. 1. **When resources and money are limited.** A Questionnaire can be quite inexpensive to administer. Although preparation may be costly, any data collection scheme will have similar preparation expenses. The administration cost per person of a questionnaire can be as low as postage and a few photocopies. Time is also an important resource that questionnaires can maximize. If a questionnaire is self-administering, such as a e-mail questionnaire, potentially several thousand people could respond in a few days. It would be impossible to get a similar number of usability tests completed in the same short time.
2. **When it is necessary to protect the privacy of the participants.** Questionnaires are easy to administer confidentially. Often confidentiality is the necessary to ensure participants will respond honestly if at all. Examples of such cases would include studies that need to ask embarrassing questions about private or personal behaviour.
3. **When corroborating other findings.** In studies that have resources to pursue other data collection strategies, questionnaires can be a useful confirmation tools. More costly schemes may turn up interesting trends, but occasionally there will not be resources to run these other tests on large enough participant groups to make the results statistically significant. A follow-up large scale questionnaire may be necessary to corroborate these earlier results.
 |

* Closed ended questions are those questions that offer limited response and in most case a yes or no answer. Closed format questions offer many advantages in time and money. By restricting the answer set, it is easy to calculate percentages and other hard statistical data over the whole group or over any subgroup of participants.
1. **Observation**

Observation is a primary method of collecting data by human, mechanical, electrical or electronics means with direct or indirect contact. As per [Langley P](http://www.isle.org/~langley/), “Observations involve looking and listening very carefully. We all watch other people sometimes but we do not usually watch them in order to discover particular information about their behaviour. This is what observation in social science involves.”

There are many types of observation, direct or indirect, participant or non-participant, obtrusive or non-obtrusive, structured or non-structured. The observation is important and actual behaviour of people is observed and not what people say they did or feel.

* **Obtrusive** mean visible, thrusting out or evident. It is like class monitor, traffic warden or inspector.
* **Unobtrusive** mean hidden, camouflaged or low-key. In such method, the researcher is not required to intrude
* participative observation, the observers becomes a participant in the program or culture or context being observed
1. **Interview**

In-depth interviews, also called as one-to-one interviews, are expensive in term of time and money but are good for exploring several factors. Problems identified in an interview may be a symptom of a serious problem.

The interviews may be conducted face to face or through telephone or these could be [computer](http://hubpages.com/hub/Data-Collection-Methods) assisted interviews. Nowadays, television interviews have become more common.

But interviews are fraught with bias from three sources,

* the interviewer,
* the interviewee and the
* Interview setting.

The interviewer may misinterpret the response or distort it while writing down. He may unintentionally encourage certain responses though gestures and facial impressions. The interviewee may not give his or her true opinion or avoid difficult questions. The setting may be good or bad creating comfort or discomfort. It may be open or in presence of some colleagues or senior or level of trust may be inadequate.

In order to minimize bias, the interviewer should have knowledge, skill and confidence. Rapport and trust should be established in the interview.

**2.2.1 SECONDARY INFORMATION**

Secondary data is data which has been collected by individuals or agencies for purposes other than those of our particular report. Secondary data is the data that have been already collected by and readily available from other sources. Such data are cheaper and more quickly obtainable than the primary data and also may be available when primary data can not be obtained at all.

Secondary data can further be divided into two parts.

* Qualitative data includes biographies, personal letters, diaries, [records](http://www.blurtit.com/q959688.html), documents, published material, computer database, policy statements, etc.
* Quantitative data would have market research, census, and Economic documents, planning documents or specimens.

|  |
| --- |
| Secondary information in an organisation can include;* Other reports
* Policy manuals
* Letters
* Minutes of meetings
* Agenda
* Contracts
* Profiles
* Curriculum vitae
* Employee registers.
* Bank reports
* Financial statements
* Website
* Publications
* TV
* Newspaper
 |

Assume you are writing an incident report, the following information sources can be used;

|  |  |
| --- | --- |
| **INFORMATION SOURCE** | **INFORMATION THAT IT PROVIDES** |
| Interviews with eyewitness | This can provide information on what, how, when an incident occurred. In addition, it can also provide information on who was affected. |
| Observation | By observing the scene, one can know the extent of the damage caused by the accident. If the reporter also witnessed the incident information about what, how, when an incident occurred can be collected. |
| Past incident reports | These can give the report writer information on ways of preventing the accident from happening in the future. |
| Brainstorming | Provide recommendations for prevent future occurrence of the same incident.  |

|  |
| --- |
| **LEARNING ACTIVITY**Assume you have been tasked to write a business trip report.1. List the information sources that you would consult
2. Explain how the information sources can assist you when writing the report (i.e what information does each source give you.
 |

**2.2.2 LINKING REPORT HEADINGS TO SOURCES OF INFORMATION (SO 2, AC 1)**

A Table can be created which links a report, its information source and the specific headings which depend on the information source. Below is just an example (it is not exhaustive);

|  |  |  |
| --- | --- | --- |
| **NAME OF REPORT** | **INFORMATION SOURCE** | **SPECIFIC REPORT HEADING** |
| Progress report | * Observation
 | Work completed to date; difficulties encountered |
| * Superiors instruction
 | Introduction, description of task |
| * Previous progress report
 | introduction |
| * Discussion with colleagues and brainstorming
 | Conclusions and recommendations |
| * Daily log book
 | Work completed to date |
| Business trip report | * Observation
 | Extent to which the purpose was achieved; unexpected observations |
| * Interviews
 | Unexpected observations, consequences of the observations, recommendations |
| * Superiors instruction
 | Purpose of the trip, introduction |
| * Journal
 | Extent to which the trip was achieved |
| * Discussions with colleagues
 | Consequences of the observations; recommendations |
| * Personal brain storming sessions
 | Consequences of the observations; recommendations |
| Accident report | * Observations
 | **State the facts** of *Who, What, Where, When, Why, and How* the incident / unusual occurrence happened?; Witness(es) |
| * Interviews
 | **State the facts** of *Who, What, Where, When, Why, and How* the incident / unusual occurrence happened?; Witness(es) |
| * Objects
 | **State the facts** of *Who, What, Where, When, Why, and How* the incident / unusual occurrence happened?; Witness(es) |
| Performance report | * Observation
 | Factor rating, recommendations |
| * Progress reports
 | Factor rating, recommendations |
| * interviews
 | Factor rating, recommendations |

|  |
| --- |
| **LEARNING ACTIVITY**Think of a report that you intend to write in your organisation. 1. List the information sources that you shall use.
2. Identify the report headings.
3. Link the information sources to the report headings.
 |

## 2.3 CONFIDENTIALITY OF INFORMATION (SO 2, AC 2)

When collecting data we need to take note of the confidentiality of the information. Confidential informationcontains data that for one or more reasons should only be disclosed to specific people or groups. Or confidential information is information that one person entrusts to another person with the expectation that privacy will be maintained. A record that contains confidential information is considered a confidential record.

The following are a few examples:

|  |  |
| --- | --- |
| bullet | Trade Secrets: formulae, recipes, production methods, source codes, test results and other information obtained by research or other work;  |
| bullet | Business Secrets: budgets, customer lists, marketing plans and other information the release of which would be advantageous to a competitor and injurious to the claimant;  |
| bullet | Personal Information: diaries, photographs, private information about public figures the disclosure of which could be profoundly embarrassing; and  |
| bullet | Professional Information: information supplied to a solicitor, accountant or other professional advisor in the course of his or her professional duties. |

|  |
| --- |
| **Examples of confidential information*** + Reference letters
	+ Disciplinary reports
	+ Personnel Records
	+ Evaluations of performance
	+ Counsellors Client Files
	+ Grievance Files
	+ Appeal Files
	+ Payroll Records
	+ Contract of employment
	+ Strategies
 |

When collecting data from a confidential document

* Ensure that confidential information is not inadvertently disclosed:
* Position your computer screen so that no unauthorized persons can read it.
* Close down the program or use password protection on your computer when you leave your desk.
* Turn off your computer when leaving your desk for a long period of time.
* Place paper copies of drafts and final versions in locked file cabinets when you are not working on them.
* Shred drafts when they are no longer useful, and delete drafts from your computer
* If you have confidential records on a notebook or laptop computer, ensure that the documents themselves or the system is password protected. Don’t leave your laptop in an easily accessible area where it could be stolen.
* When travelling with confidential records, don’t leave them unattended in vehicles, hotel or meeting rooms. Don’t work with confidential records where others can see them.
* When faxing confidential records, include a fax transmittal page with a confidentiality statement. Verify that the number on the screen is accurate before proceeding with the transmission, and confirm receipt of the documents.

During the process of data collection (preparing for a report) it is important to know,

* The information source
* From whom it shall be obtained
* Level of confidentiality
* To whom it should be returned

For example, a manager is writing a disciplinary report and as part of planning he/she can use the table below

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **ISSUE** | **SOURCE** | **FROM WHOM** | **CONFIDENTIALITY** | **TO WHOM TO RETURN** |
| Past performance | Performance appraisal  | HR Manager (Busi) | High | HR Manager |
| Disciplinary ruling | Minutes | Secretary or Chairman disciplinary committee | high | Secretary or Chairman disciplinary committee |
| Fairness of judgment | Minutes; disciplinary procedure (policy); labour law, CCMA guidelines | Secretary or Chairman disciplinary committeeCCMAInternet | high | Secretary or Chairman disciplinary committee |

The above table will assist the author to know the issue, what to collect, from who, and level of confidentiality.



|  |
| --- |
| **LEARNING ACTIVITY**Why is confidentiality important when collecting information to write a report. |

## 2.4 COMPANY PROCEDURES FOR INFORMATION RETRIEVAL (SO 2, AC 3)

Each and every organisation has a policy or procedure that must be used when obtaining information. This procedure identifies;

* Who can access certain documents
* In what cases or situation
* Who must authorize such documents?
* Process of authorizing
* When they must be returned.
* How to track documents that have been dispatched.

**An example**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **INFORMATION SOURCE** | **WHO CAN ACCESS** | **AUTHORISATION** | **PROCESS OF AUTHORISATION** | **WHEN THEY MUST BE RETURNED** |
| Performance appraisal | Employee manager; chairman of disciplinary hearing; court | HR Manager | Signature of the HR Manager or representative | 24 hours |
| Minutes  | Meeting participants, superiors | Office manager | Fill-in an application form to have access to minutes. The form must be approved and signed by the office manager before access is granted | 2 days |
| Project report | Project manager, superior | Project manager | Fill-in an application form to have access to minutes. The form must be approved and signed by the project manager before access is granted | 3 days |



|  |
| --- |
| **LEARNING ACTIVITY**1. Identify and describe policies that exist in your organisation to guide the collection of information.
2. List examples of confidential records that might exist in your organisation.
3. Explain the importance of collecting data when writing reports.
 |

# SECTION 3: REPORT COMPILATION

**Specific Outcomes**

Compile reports related to a selected business function.





**Assessment Criteria**

This specific outcome shall cover:

* The identified reports are compiled using current information.  (SO 3, AC 1)
* The report is distributed in the required manner in time to meet the specified deadline. (SO 3, AC 4)

## 3.1 INTRODUCTION

When compiling a report it is important to;

* Understand why the report is required and the terms of the brief. (terms of reference)
* Know the due date and accept that you will have to work hard to have the report completed and ready on that date.
* Plan how you will proceed to gather information (procedures)
* Plan how you will meet the deadline – estimating how long each part of the process will take, allocating a time period to do each section.
* Gather the information. Group the relevant information together. (findings) Record the results that you found.
* Generate as many possible solutions. Select possible solutions. Record these as (conclusions).
* Decide on the best options for solving the problem. (Recommendation)
* Double check that the recommendations are linked to the conclusions which are linked to the findings which in turn are link to the procedures.
* Write the report.
* Proof-read the document.

## 3.2 REPORT WRITING PROCESS (SO 3, AC 1)

Writing is a process of:

* planning;
* writing; and
* revision.

Pretty simple, huh? But it is NOT a linear process. If you "plan", and then "write", and then "revise", and then stop -- hand it in -- the odds are it will be pretty bad. Writing is a non-linear, often circular, process that looks like:



Most people find that "planning" is the best place to start. Most people also "start at the beginning". If that doesn't work for you, **start somewhere else**. [It's pretty easy to "chop and change" later with a good word processing package.] Thus, if you really can't seem to get into writing the introduction, "stuff the introduction", start somewhere in the middle! If you can't seem to get a good "plan" or "outline" that works, "stuff the plan" and start writing. Very soon, you will start to see what must come before, and what must come after, the bit that you're writing now. And thus your plan evolves.

Usually it is easier to "start with the plan", and to "start at the beginning", but if that isn't working, try something else. You are judged by the finished product, not how you got there. As you get more experience, and develop more confidence, it all starts to fall into place. Trust me -- I survived all the writing horrors I had in high school, and uni, and lived to tell the tale.

**REMEMBER: It is not a "once through" linear process!** Regardless of where you start, you will probably have to modify your plan, and what you wrote, many times. How many times? Well, that depends a bit on whether you're writing a 2-page essay, a 10-page report or a 600-page manual. You should keep going until you "get it right" and/or are satisfied with the result. Often, you will stop when it's time to hand it in, or you fall asleep, or it's time to work on something else. [Having taught "How to write" courses for many, many years, I'll still go through at least two -- maybe three -- drafts in writing this document.]

## 3.2.1 LOGICAL STRUCTURE

By logical structure is meant the natural unfolding of a story as the reader progresses through the document. This is achieved by going from the general to the specific, with the background material preceding the technical expose, which should lead logically to the conclusions. Consider a good joke. It has the structure as shown in Fig.1:

|  |
| --- |
| **Figure 1:** Joke structure |
| \begin{figure} \begin{center}\begin{picture} (184,12) \thinlines \drawcente... ...\drawcenteredtext{170.0}{6.0}{Punchline} \end{picture} \end{center}\end{figure} |

In our case, the punch line is the set of conclusions. Everything should support the conclusions and naturally lead up to them. Remember this when constructing your contents list! A typical technical report has the following progression:

|  |
| --- |
| **Figure 2:** Report structure |
| \begin{figure} \begin{center}\begin{picture} (60,116) \thinlines \drawshado... ...ssion and Conclusions} \end{picture} \unitlength=1.8mm \end{center}\end{figure} |

**3.2.2 WRITING IN THIRD PERSON**

To write in the third person you must imagine that you are an outsider reporting the events and actions of your subject, rather than writing as though the events are happening to you. You either use people's names or the third person pronouns. Remember, pronouns are classified as follows: The singular pronouns refer to one person, and the plural pronouns refer to more than one. Within each of these two groups, they're classified as either first, second, or third person. Here is the classification:

**A. Singular Pronouns**
1. First Person: I, me, my, mine
2. Second Person: You, your (and the old forms thee, thou, thy, thine)
3. Third Person: He, him, his, he, her, hers, Its

**B. Plural Pronouns**
1. First Person: We, us, our
2. Second Person: You, yours (or "Y'all" in the South, plus the old forms)
3. Third Person: They, them, their, theirs; names

One way to think of it is "I" come first; "You" come second, and everybody else comes in third.
So when you write in the third person, use the third person pronouns, as above, and don't use the first or second person. For example, don't say, "He told me," but rather "He said." Instead of "One of the questions I asked him is 'Why did you decide to be on the football team,' " you could write, "When asked why he decided to be on the football team, John replied ...." Hope this helps.

*If writing about yourself in a resume or report use a noun such as "The applicant" or "The researcher" rather than a pronoun.*

|  |
| --- |
| **LEARNING ACTIVITY**Rewrite the following in third person1. "I went to the site".
2. "I like the sport, the coach, and my teammates," said Mfundo
3. “We then went to visit the people suffering from Malaria in the nearby village”
4. “I am writing this report to provide solutions to some of the problems that we are encountering in executing the delegated tasks”
5. “As a recommendation, i propose the project be stopped pending investigations”
 |

## 3.3 TIPS IN REPORT COMPILING

In summary a good report must be;

* Short but complete (concise);
* Containing only what is necessary;
* Simple; written in good language;
* Having no repetition, no redundancy;
* Including no preaching, lecturing;
* Containing interesting and relevant information;
* Well structured and organized;
* Neat and tidy (typed or well printed/written).
* Attractive
* Straight forward, honest, no deception (no lies)
* Interesting illustrations, designs. (colour if possible)
* Brief, short
* Neat and readable (good handwriting)
* To the point
* Simple English (or whatever language)
* Well spaced
* Has title and sub titles
* Organized or structured.

## 3.4 DISTRIBUTION OF REPORTS (SO 3, AC 4)

After a report has been written, it must be distributed to its intended reader. The distribution method must consider;

* Accessibility of the reader
* Cost
* Time
* Distance
* Ease of sending and retrieval.
* Company policy

A report can be distributed by the following forms;

* Email
* Postage
* Internal mail
* Courier
* Delivery
	+ - 1. **Email distribution**

E-mail is used widely for internal and external communication. It is quick and reliable, cheaper than using paper and employing someone to do internal mail. With e-mail, the message is typed, sent to the receiver's e-mail address immediately and the receiver is made aware that he has a message waiting.

|  |
| --- |
| **Attachments to the email**Make sure that your recipient can receive them. Sending attachments is a normal practice when you are submitting documents for review or exchanging information in the workplace. * Note: Add a note at the end of the email to indicate that there are attachments (2 Attachments). This will inform your reader that there are attachments and the reader can then check that they have received all the relevant documents.

**NOT**: “Please find …” or “Attached please find …”**JUST**: “I attach the following: …” |

**Ten Tips for Effective E-Mail**

1. Think before you write. Just because you can send information faster than ever before, it doesn't mean that you should send it. Analyse your readers' needs to make sure that you are sending a message that will be both clear and useful.
2. Remember that you can always deny that you said it. But if you write it, you may be held accountable. You may be surprised to find where your message may end up.
3. Keep your message concise. Remember that the screen only shows approximately one half of a hard-copy page. Save longer messages and formal reports for regular ('snail') or overnight mail. On the other hand, do not keep your message so short that the reader has no idea what you are talking about. Include at least a Summary (Action or Information) in every E-mail message.
4. Remember to indicate how many attachments you have sent with the email
5. Remember that E-mail is not necessarily confidential. Some companies will retain the right to monitor employees’ messages. (Refer to #1 and #2.) Don't send anything you wouldn't be comfortable seeing published in your company's newsletter.
6. Don't FLAME your readers. It's unprofessional to lose control in person; to do so in writing usually just makes the situation worse. (Refer to #2 and #4.)
7. Don't spam your readers. Don't send them unnecessary or petty messages. Soon, they will stop opening any message from you. (Refer to #1.)
8. DON'T TYPE IN ALL CAPS! IT LOOKS LIKE FLAMING! Remember that if you emphasize everything, you will have emphasized nothing.
9. don't type in all lower case. if you violate the rules of english grammar and usage, you make it difficult for the reader to read.
10. “*Take the time to poofread your document before you sent it. Rub the document thru the spell checker and/or the grammer checker. Even simpl tipos will make you look sloppie and damage you re proffessional credubility*.”
	* + 1. **Postage**

Is a method for transmitting information and tangible objects, wherein written [documents](http://en.wikipedia.org/wiki/Document), typically enclosed in [envelopes](http://en.wikipedia.org/wiki/Envelope) and also small [packages](http://en.wikipedia.org/wiki/Packages) are delivered to destinations around the world. Anything sent through the postal system is called *mail* or *post*. In South Africa post is delivered through the Post office. This distribution method is usually used when the recipients are outside the company.

* + - 1. **Internal mail**

This distribution method involves sending reports using internal messengers. This method is limited to recipients within the organisation. It is a suitable method to distribute confidential information.

1. **Courier**

A courier is a [person](http://en.wikipedia.org/wiki/Person) or a [company](http://en.wikipedia.org/wiki/Company_%28law%29) who delivers [messages](http://en.wikipedia.org/wiki/Message), [packages](http://en.wikipedia.org/wiki/Parcel), and [mail](http://en.wikipedia.org/wiki/Mail). Couriers are distinguished from ordinary [mail](http://en.wikipedia.org/wiki/Mail) services by features such as speed, security, tracking, signature, specialization and individualization of services, and committed delivery times, which are optional for most everyday mail services. As a premium service, couriers are usually more expensive than usual mail services, and their use is typically restricted to packages where one or more of these features are considered important enough to warrant the cost.

Different courier services operate on all scales, from within specific towns or cities, to regional, national and global services. The world's largest courier companies are [DHL](http://en.wikipedia.org/wiki/DHL), [FedEx](http://en.wikipedia.org/wiki/FedEx).

|  |
| --- |
| **EXAMPLE OF A POORLY WRITTEN REPORT**(Bracketed comments indicate incomplete information or weaknesses)Tuition by Joe DoeIntroduction.I analyzed the tuition at the MIAC colleges.  *[What is MIAC?  For what time period?  Why would you want to do this?]* The median was 16353, and the range was 13340 to 23469. *[The median what? What is the unit of measure?  What does this tell the reader about the tuitions?]*Methods.The data was found on the Internet at nces.ed.gov *[What is this web page?  Is the source reliable?]* The variable of interest was tuition.  [*What is an individual?  What is the type of the variable?  What are the units of measure?]* To describe the data, I used a stemplot, median, and IQR.  [What specifically are these tools used for?] *StataQuest* 4.0 was used for all analyses on the computer in my dorm room.  [What type of computer was used?]Results.The data was skewed toward high values.  *[What is the data?  What is the context?]*  The median was 16353, *[the median what?  what is the unit of measure?]* and the IQR was 2115*. [The IQR of what?  What is the unit of measure?]* There were two outliers at 20688 and 23469. *[Identify the outliers and how they were determined to be outliers]*Discussion.Most of the data was between 15000 and 19000. *[What data?  What is the context?  Units of measure?  What does this tell you about the variable?]*  Half were below 16353, with the middle half between 15365 and 17480. *[Half of what?  Units of measure?  What does this tell you about the variable?]***APPENDIX.**Table.  Raw Data.  *[What is the data?  For what time period?  Units of measure?]*college                  tuition Augsburg              15250 Bethel                   15365 Carleton               23469 St. Benedict's       16441 St. Catherine's     15578 Concordia             13340 Gustavus              17480 Hamline                 15798 Macalester            20688  St. John's             16441 St. Mary's              13645 St. Olaf                  18250 St. Thomas           16353 |

## 3.5 LANGUAGE USED IN REPORTS

The table below helps one to understand the language used at each stage of a general report. Remember, a general report is composed of the following headings; Introduction, Procedure or Method, Findings, Conclusions and Recommendations. This activity helps you to understand what language is used in each of these stages.

Top of Form

|  |  |
| --- | --- |
| **Report Stages** | **Phrases**  |
| **1** | Introduction - Who requested the report | Data for the report was gathered from ... to ... |
| **2** | Introduction - When the report was requested | The report presents ... |
| **3** | Introduction - Why the report was requested, and the Aim | I believe that the reasons for this include... |
| **4** | Introduction - Overview of the structure of the report | The survey respondents said that... |
| **5** | Procedure - When the data was collected | In conclusion, the results show that... |
| **6** | Procedure - How the data was collected | These conclusions lead to a number of possibilities for further action. These are... |
| **7** | Findings - Description of the information you discovered | The report was requested on ... |
| **8** | Conclusion - Summary of what you discovered | Primary data was collected by surveying... |
| **9** | Conclusion - Your ideas about the reasons for the things you discovered | The report aims to... |
| **10** | Recommendations - What you think should happen | This report was requested by... |

# SECTION 4: VERIFICATION OR REPORTED INFORMATION

**Specific Outcomes**

Liase with relevant parties and verify that reported information is in accordance with requirements.





**Assessment Criteria**

This specific outcome shall cover:

* A table is compiled listing each of the relevant recipients of the reports, a space for comments and an overall rating of the report in terms of whether it meets their information requirements and purpose.   (SO 4, AC 1)
* The form is distributed to recipients and their comments evaluated to determine useful of report.   (SO 4, AC 2)
* Possible amendments to reports are made in line with suggestions from recipients. .  (SO 4, AC 3)

## 4.1 INTRODUCTION

Written reports must be subjected to evaluation or verification. Evaluation is systematic determination of merit, worth, and significance of a report using criteria against a set of standards. Generally, reported information must meet requirements and purpose of the report.

**THE OBJECT OF WRITING REPORTS**

Writing reports is for a purpose. Report writing must not defeat its object. When you are asked to write a report, you are provided information. You are expected to competently analyse that information, draw consistent conclusions, and make sensible and practical recommendations in your report.

Before writing a report you must be clear on your brief. You can not write a report usefully without being sure of its object. In writing reports it helps to also clarify the information provided. Report writing can fail in its object by the assignor assuming that you have some of the needed information. Be absolutely clear of the object of the report, and of the adequacy of the information you have, before writing reports. the object of writing reports is to offer directly related suggestions.

In report writing bear in mind that the assignor may have incomplete information affecting even the object of writing the report.

When you are asked to write a report, while do not assume the role of a researcher, do be clear on what is wanted and of the information provided. The object of report writing is to find practical solutions to issues of briefs to write reports on.

## 4.2 VERIFICATION PROCESS

The verification process takes note of the following factors;

* Does the report meet the requirements e.g. if it is an incident report, does it give the reader of what, where and how things happened.
* How current is the information?
* Is the content accurate and objective (i.e. Are there political, ideological, cultural, religious, or institutional biases; Is the content intended to be a brief overview of the information or an in-depth analysis; If the information is opinion is this clearly stated?  ; If there is information copied from other sources is this acknowledged? Are there footnotes if necessary?
* Does the report conform to the format of the organisation?
* Did the report adhere to grammar and punctuation rules?



|  |
| --- |
| **LEARNING ACTIVITY**1. Discuss your organisational requirement in report writing?
2. How are reports evaluated?
 |

## 4.3 EVALUATION OF REPORTS BY RECEIPIENTS (SO 4, AC 1, AC 2)

The best person to evaluate the accuracy of a report is the recipient. The recipient is in a better position to check if the report meets his /her informational requirements. The following key elements can be used to evaluate a report;

* Clearness
* Concise
* Completeness
* Accuracy or correctness

**1. Clear**

Information has to be understood at the first reading. The report has to be easy to read with legible writing and a clear message.

Clear Unclear

Rotated the mattress so the Turned the bed over.

head end became the foot end.

**2. Concise**

Your report is only to be as long as you need to include the necessary information. Use short, simple sentences. Do not use jargon or words that aren’t required.

Concise Not concise

On his return he was asked to And then I said to him that if

put the groceries away. it was possible he should put

 the groceries away when he

 came back from the shops.

**3. Complete**

Ensure all required information is in the report.

Complete Incomplete

He pushes carrot out of his mouth He spat out his dinner again.

whenever I feed it to him.

**4. Correct**

Every piece of information must be accurate and verifiable.

Accurate Inaccurate

I will ask Terry if he likes being Someone said Terry’s brother

called ‘bags’ and by whom. gave him the nickname ‘bags’ because his trousers always hang around his butt and he likes it.

**5. Organisation**

Poorly organized reports can leave readers feeling lost and confused, so it’s important that reports be well-organized. The best way to organize information will depend somewhat on the type of report and the complexity of the situation. A simple incident report might work best if organized in chronological order. An inspection report, on the other hand, might flow better if organized by type of violation (e.g., blocked exits in three areas) or by location (e.g., problems noted room-by-room).

**6. Objective**

Objective reports are fair and impartial, not influenced by emotion or opinion. One key to being objective is to avoid words whose connotations change the tone of the report.

 Subjective: The man attacked an old bag lady.

 Objective: The man attacked an elderly homeless woman.

Template like the one below can be used when evaluating reports;

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **REPORT EVALUATION TEMPLATE**NAME OF REPORTER.....................................................................................................DATE WRITTEN...............................................................................................................SUBJECT OF THE REPORT.............................................................................................RECEIPIENT.....................................................................................................................

|  |  |  |  |
| --- | --- | --- | --- |
| **evaluation criterions** | **Met requirements** | **Did not meet requirements** | **Areas to be amended** |
| Completeness |  |  |  |
| Objectivity  |  |  |  |
| Correctness |  |  |  |
| Organisation |  |  |  |
| Conciseness |  |  |  |
| Clearness |  |  |  |
| Timeliness |  |  |  |

Overall rating and comments\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Signature of the evaluator  |

The report evaluation template can be distributed using the following channels;

|  |  |
| --- | --- |
| http://t2.gstatic.com/images?q=tbn:ANd9GcR-8wr57-Wzdt0y-judoZHfTBMF25qOUwxYbvZfN7J2fTygHyw0qg | Email |
| http://t1.gstatic.com/images?q=tbn:ANd9GcSm023hYSYMwMv4MzmGqDDxwslZk70dZhENbTSZ1SlFRBUjibLd | Hand delivery |
| http://t2.gstatic.com/images?q=tbn:ANd9GcSSVZOKMBbs0Vv1hTbxmB1Y-O17wSrRukmO0qHLzUMRKwc2q0nT | Courier  |
| http://t1.gstatic.com/images?q=tbn:ANd9GcQYojUTiULXFdAtn_Pq9zFA4650NwziXin34WU9W1KSyHVa1D-t | Fax machine |

The distribution method depends on the distance between the report writer and the recipient, mode of communication available, timeframe among other factors.

|  |
| --- |
| **NOTE**The above distribution methods have been discussed in earlier sections. |

## 4.4 REWRITING A REPORT (SO 4, AC 3)

After the report writer receives the amendments from the recipient of the report, he or she must proceed with effecting the required changes. Amendments that can be effected can range from;

* Changing the report format.
* Changing the language used.
* Acknowledging sources consulted.
* Confirming the validity of sources.
* Rewriting the report in a clearer structure.
* Adding omitted sections of the report.
* Using third person in the report.

Let us look at the following report. Suggest areas of amendment for this report.

|  |
| --- |
| **INCIDENT REPORT**On the above date and time, this reporting officer responded by marked patrol car to the scene of a burglary after receiving a radio call wherein a perpetrator had absconded with a TV. I dusted for prints around the front door and shelf where the TV was taken from in the living room. I lifted a latent from the shelf and placed it on a fingerprint card. The victim was questioned by me, he was one Tony Brown. Brown stated, “I deactivated my TV and left my domicile on this date at approximately 7:30 am in the morning. Brown further related that "I returned at about 5:30 pm this evening. I had locked his doors and windows before I left my house.” The victim also articulated that he found his front door open upon his return to his place of residence. Upon entering, he discovered his TV had been stolen and was missing. Upon concluding my investigation, I departed the scene. |

