REPORT WRITING BASICS FOR FIRST NATION HOUSING PROFESSIONALS

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BACKGROUND

Each First Nations Housing Professional (FNHP) program course contains two assignment components. The assignments require you to apply what you have learned in the course to help a First Nations housing organization improve their performance and organizational outcomes. It is helpful to approach each assignment from the perspective that you are a consultant who is hired to help the organization address a particular problem of challenge. In effect, your assignment actually takes the form of the final report you would submit to the organization in your capacity as their consultant or housing professional.

First and foremost, you want your report to incite action and propel change. That primary objective simply won't be accomplished if your report does support a valid methodology or provide clear recommendations based on solid research and analysis.

If you have not completed a professional report or are a little rusty and need a refresher, the basics outlined in this guideline will help you:

- understand possible reporting formats, their related components and general reporting tips and practices;
- develop good report writing styles;
- determine what reporting format should be used based on the reporting needs;
- develop a report and use a reporting format appropriate to the intent of your final project; and
- provide tips on proof reading reports.

Upgrading your understanding and ability to write effective reports is an objective of the FNHP program. After all, your ability to communicate and propel change is key to applying what you learn in the program.   It should be noted that certain internal elements of the assignment reports will vary depending on the nature of the assignment.

REPORT WRITING BASICS

Report writing is one of the most critical elements used to support knowledge-based decision-making. Here, all of your research, analysis and recommendations are finally translated into a report. It is the face of the project undertaken. The project is judged based on reader response to your report.

Therefore, collecting information and organizing it clearly into meaningful reports that support decision-making is a critical skill all managers must acquire to be successful. A final report could make or break an entire project and influence your career success.

A good report should effectively convey what the writer wants to say or what the outcome of the project is, and the next steps required. A report is as much a communication tool as it is a decision-making tool. This becomes very relevant if the report is going outside of the organization as it could also serve as a public relations vehicle.

To be effective, a report must pay attention to the same aspects of written communication as other documents such as:

- characteristics of the audience;
- structure of report is appropriate for its purpose; and
- use of appropriate tone and language that the audience can understand.

Common features of all reports are:

- they set out a series of facts based on evidence of some kind;
- the information they provide can usually be checked;
- the information is set out in such a way as to be most useful to the reader; and
- they are usually aimed at readers with a specific interest in the subject.

Planning Your Report

Before you begin preparing your report, there are several questions that must be addressed in order to effectively write it.

Audience

- Who is your report aimed at?
- Who else may read it?
- How formal or informal should it be?
- What does your audience know?
- What do you want them to know?

Purpose

- What is its main purpose?
- What are its secondary purposes?
- What are the questions that you will address?

Issues

- How long do you have to complete the report?
- Are you working alone?
- Who are you required to consult?
- What will the status of the report be?
- How long should it be?

Types of Reports

Reports can be divided into two main categories: informal and formal reports. An informal report is relatively short (fewer than ten pages), personal in tone, is written in a succinct manner and is used for ongoing analysis or updates. A formal report is usually long, contains detailed analysis and research, as well as recommendations or solutions.

All reports have three main sections in the report which include the Introduction, Discussion/Analysis and Recommendations.

Report requirements will vary within the three main sections depending on the nature of the report. For example, a benchmarking report will have different sections within the body of the report than a report on a new service proposal. A possible outline for a benchmarking report is attached in Appendix A.

Formal Report Format

We will look in detail at the formal report, since many aspects of this report are used by the other formats. The FNHP program assignments are formal reports.

A report can be largely divided into the following parts:

1. Cover page and title page
2. Summary of the report (Abstract or Executive Summary)
3. Table of Contents
4. Introduction to the report
5. Body of the report
6. Recommendations and action
7. Conclusion
8. References
9. Appendices

Let us examine each of the above in detail and see how to present them so that we have an effective report.

1. Cover and Title Page

The cover and title page is the first encounter the audience has with the report and it must be eye-catching. The cover also serves to further the corporate image of the organization.

The page has a major impact on the reader's first assessment of the report. It must draw the reader's attention immediately and make them want to read on. The page should be precise and convey the main objective of the study or the project. The title of the report should be short and say what the report is about. The purpose of the page is to inform readers what the document is about and to distinguish one report from another.

2. Summary (Abstract/Executive)

This is the most important part of the report. The summary should contain a brief abstract of the report. The entire information carried in the report must be conveyed in its essence. It is here that a reader will decide whether or not they will read the entire report. Even if they do not read the body of the report, the conclusions and recommendations must be understood within this section.

The summary must be precise and use as much non-technical language as possible. This is especially relevant in the case of large organizations, as the users of the report in other departments may base

their decisions on this summary section only.

The purpose of a summary is to:

- help the reader decide if they need to read the whole report;
- enable the reader to get key points reliably and quickly;
- focus the reader's attention on the aims of the report; and
- help the reader remember the key points.

3. Table of Contents

This section gives the broad contents of the report and the flow of information in the report. The arrangement of topics and the flow of information should be as logical as possible and ideas should naturally follow each other.

A table of contents is constructed by taking the headings in the report and compiling them into a list with the sequence determined by page numbers. These headings should be specific to the content of that section.

4. Introduction

The aim of the introduction is to:

- provide background, to present the essential elements concisely and clearly;
- explain why the report was written;
- explain what the report is about;
- tell what scope was given in the preparation of the report;
- inform what constraints were present (such as time, personnel, materials, etc.); and
- prepare the reader for the information they are about to read in the main body.

5. Main Body of the Report

This part of the report discusses the project in depth. This will include the steps taken for the research, the actual research carried out and the data collected and used for the study.

The key questions to bear in mind are:

- What do the readers want or need to know?
- What is the most effective order of arrangement?
- How much detail is required?

In case of data, the following should be noted: If the data is small and manageable, then the data can be included in the main body of the report. However, if the data is large and unwieldy, it can be included as appendices. Similarly, any reference material which is to be quoted or any concept is to be explained can be attached as appendices if it is of significant size.

Where possible it is helpful to use tools such as a SWOT or chart to provide a quick and easy visual of key parts of the content.

6. Recommendations and action

This section is to be included if specific actions are to be taken based on the report. Recommendations must be clear and concise and along with the supportive action. There should be no discussion and they are best presented as a numbered list. Numbering the recommendations allows people to deal with them in a logical order and use it as a checklist.

7. Conclusion

This section should succinctly repeat the logical outcomes of all that was discussed in the previous parts. All conclusions must be objective and should avoid reiterating the facts. Providing information on next steps will help inform the reader.

8. References

All sources of information must be included in the report. How extensive this inclusion varies on how much detail is required by the reader and what the reader needs to know.

There are numerous styles for writing the reference section. The following two reference styles are used commonly in business reports.

APA Reference Style

The following are examples of how to reference using the APA style.

Book
Author, A. A., Author, B. B., & Author, C. C. (1996). Title of book: Vol. 1. Title of series. City, Country: Publisher.

Journal Article
Author, A. A., Author, B. B., & Author, C. C. (1996). Title of journal article. Title of journal: Subtitle of journal, volume number (issue number), first page-last page.

Internet Source
Author, A. A. (1996). Title of electronic text [E-text type]. Location of document
Further Reading: Publication Manual of the American Psychological Association. 5th edition. Washington: APA, 2001.

MLA Style

The following are examples of how to reference using the MLA style.
Book
Author(s). Title of Book. Place of Publication: Publisher, Year of Publication.

Journal Article
Author(s). "Title of Article." Title of Journal Vol (Year): pages.

Internet Source
Author(s). Name of Page. Date of Posting/Revision. Name of institution/organization affiliated with the site. Date of Access.

Further reading: Gibaldi, Joseph. MLA Handbook for Writers of Research Papers. 5th edition. New York: The Modern Language Association of America, 1999.

The following links provide a more detailed analysis of the APA and MLA reference style.

[APA Citation Style](#)
[APA Formatting and Style Guide](#)
[Using MLA Style to Cite and Document Sources](#)

9. Appendices

Appendices contain information that if not included may result in questions about your research, analysis and recommendations. It is also important to keep in mind that Appendices in the form of tools or samples increases the odds that the recommendations contained in your report will actually be implemented. The Appendices section provides supporting detailed information that if presented in the body of the report would distract the reader. Such details may include questionnaires, full lists of participants, summarized data, detailed methods or technical details, sample tools or examples. Include only one topic per Appendix. The Appendices should be numbered, "Appendix 1", or designated by a letter, "Appendix A".

For purposes of the FNHP program and the requirement for formal reports, it is possible to include content the traditional way in a Word or Excel file attachment or include a link to an internet location or embed files such as excel spreadsheets. When using links throughout a report, the reference to a numbered Appendix is required and the listing of the Appendices should be in the table of contents and attached to the report with supportive information as to their location and purpose.

When links are provided in the report, the reader needs to be informed about the content in the link and its relevance to the topic. The reader should not be sent on a journey without a map – give them a reason to click on your link and demonstrate the value of the content you have directed them to. Remember, you are acting as a consultant to your organization or a fictional one – the decision to use links rather than appendices needs to take into account a number of factors such as:

- the formal expectations of the report;
- organizational culture and related requirements;
- reader capacity to access and use IT;
- the value of the content in the link to understanding of the topic to decisions that have to be made;
- is the content neatly packaged or is it in multiple locations in a document; and,
- size of the content.

OTHER IMPORTANT FACTORS WITH REPORTS

Apart from the main structure of the report, there are other important factors to consider when writing an effective report.

Presentation

More than just making the report look "pretty", good presentation makes your document more understandable. It also reflects on the organization behind the document.

A well-designed document:

- creates an immediate positive impression for the reader;
- highlights the major topics of the document; and
- helps the reader read effectively (faster and more efficiently).

Tone

This depends on the purpose of the report. If the report is to be circulated outside the organization then one should adopt a formal tone. If it is to be used within the organization, it should be semi-formal or informal depending on the hierarchy and the working style of the organization.

Style

The style of the report should be as friendly as possible. Short paragraphs and sentences should be used. Each paragraph must address just one idea so that the reader is not confused and does not have too much on their mind.

Small topic headings should be given even if the paragraph is clear. This will help the reader decide whether they want to read it or skip it.

Spacing of the paragraphs and the fonts used should be such that it is easy on the eye of the reader and consistent throughout the report.

Text

Headings
- Help the reader find a topic or component
- Ease transitions
- Establish order
- Can use multiple levels of headings

Fonts
- Variations in fonts can be used to set off pieces of text (headings, quotes, etc.)
- Do not get carried away with use of fonts – they can distract the reader

Indentation and justification
- As with headings and subheadings, can be used to show relationship/hierarchy of topics

Bullets
- Excellent for lists
- Excellent for emphasis
- Make sure they use parallel structure (i.e., text in each is worded similarly)

Graphics
- Tables - Used to list values of at least two variables - excellent for comparison
- Pie charts - how parts relate to the whole
- Bar graphs - for comparing values, showing trends
- Line graphs - for showing trends

Coherence

The flow of ideas needs to be smooth and logical. This makes the report easy to read and will help maintain reader interest. The enormity of ideas should be introduced progressively so that there is a gradual build- up of ideas for the reader. The relationship of each fact to other facts and to the overall report should be made very clear.

Grammar

The grammar in a report should be carefully checked.
- Avoid incomplete sentences and vagueness.
- Avoid, if possible, the use of cliché phrases. Though the language sounds beautiful, one should make sure that it fits in the context of the sentence.
- Keep technical language to a level that the reader will understand.
- Avoid jargon. Use plain English at all times.

Proofreading

Once the report has been written, the writer must review it to check for grammar and spelling errors, and to see if the report makes sense and is easily understood by the reader.

Before You Begin

Writing is an odd thing – difficult for some, yet easy for others. Get organized before you begin writing your report. Sketch out your planned approach. A well-utilized methodology in report writing is the gap analysis approach. Simply put, for each challenge or issue before you, approach it by responding to the following questions:

- What is the current situation?
- What is the desired situation?
- What barriers must be overcome to achieve the desired situation?
- What recommendations can be made to overcome the barriers and achieve the desired situation?

RESOURCES

Search the Internet or Library

It may be beneficial to search in your office for reports that have been prepared by consultants. Alternatively, you can search the internet for the style of report you are required to develop.

Online Readings
- *Proofreading & Editing Tips*
- *Hit Parade of Errors in Grammar, Style and Punctuation*
- *Proofreading Your Paper*
- *Recommended Headings for Business Reports and What Report Readers Want to Know (FML)*
- *Organizing Information in Written Reports (FML)*
- *Use Your New Typographic Capabilities (FML)*

The following links provide a more detailed analysis of the APA and MLA reference style:
- *APA Citation Style Guide*
- *MLA Formatting and Style Guide*

SUMMARY

It's all about getting your message read. If your report is pleasing to the eye, well organized and easy to follow, chances are greater that your recommendations will be considered and implemented. Isn't that the greatest reward? We think so!

If you are a candidate in the FNHP program and have any questions or concerns about report writing, feel free to get in touch with your FNHP course instructor – he or she would be pleased to provide further advice and assistance.

The effectiveness of a report will be greatly enhanced if you learn to strategically plan your report, collect and analyze information, write a quick first draft, edit for accuracy and impact, and present it professionally.

This basic information provides valuable information to consider when preparing a report. Like all good things, constant practice and applying your writing skills by preparing reports will pay huge dividends. As the saying goes, "practice makes perfect".

Possible Outline for a Benchmarking Report

A. Executive Summary

A broad overview of the project and report activity should be provided along with conclusion information.

B. Introduction and Background
        B.1   **The Organization and the Project**
        B.2   **Methodology**
        B.3   **Benchmarking Team and Partners**

In this section: describe the organization; indicate what the benchmarking project is all about and relate it to strategy; provide definitions as required; explain the methodology for the project; indicate who is on the benchmarking team; and, provide information on the suitability of the benchmarking partners involved.

C. Current Situation
        C.1   **Current Activities and Measures Related to the Project**
        C.2   **External and Internal Environment Impacts**
        C.3   **Project Rationale**

In this section provide information to help understand the current situation for activities and results/measures related to the project. This will require documentation of current policy, practices or information on the service being benchmarked. Depending on the project it may be necessary to provide a related external and internal environmental analysis to see what impacts there could be on the project. Support the rationale and purpose for the benchmarking project.

D. Information Gathering and Findings

        D.1   **Method to Collect Data**

        D.2   **Findings**

In this section describe the benchmarking measurements to be used, data collection method used and report on the findings.

E. Gap Analysis

        E.1   **Analysis**

        E.2   **Recommendations**

In this section provide your analysis of the current situation to the findings, identify causes for the gaps, establish some future performance levels, determine feasibility and develop recommendations to support improvements.

F. Implementation Plan

To support the recommendations, actions plans (who, what and when) need to be included along with resource information requirements based on the performance goals and objectives. The action plan should also include communications activities necessary to share the findings and recommendations and gain acceptance.

G. Project Evaluation

This section should provide information on monitoring and assessment for the recommendations and the performance goals and objectives.

H. Summary and Conclusion

This section should provide an overview of the project activity and focus on selling the recommendations and related implementation activities.