


## MEMORANDUM

**TO:** MECH 226 Students  
**FROM:** Prof. Teslenko, Mech 226 Instructor   
**DATE:** September 20, 2017  
**SUBJECT:** Proposal for the Collaborative Formal Report

### INTRODUCTORY SUMMARY

As an engineer, you will often write proposals and formal reports, both individually and collaboratively. Your most significant writing assignment in Term 1 will be a collaborative formal report. It will provide you with an opportunity to demonstrate your knowledge of principles of technical communication and your ability to use a collaborative writing process. This process involves research, planning, drafting, conferring, revising, editing and proofreading (see “Guidelines for Managing a Collaborative Project” on pp. 83-84 in Ch. 5 in the textbook).

Before you start writing the formal report, you will write a proposal that will present your topic and the qualifications of your team. In the workplace, proposals are often written in response to a request for proposals (RFP), so consider this memo as a request for your proposal. Informal proposals are discussed in Ch. 22, so it is important to read this chapter before you prepare the proposal (pp. 537-44).

The proposed report must present a discussion of the ethical implications related to the use of communication technologies in the workplace. Here is a list of possible topics:

- Blogs, Wikis, and Web-pages in Workplace Communication: Ethical Issues
- Social Media in Workplace Communication: Ethical Issues
- The Ethics of Using Artificial Intelligence in Workplace Communication
- Human-Computer Interaction: Ethical Issues

Your purpose is to investigate some aspects of these technologies and the potential ethical issues. You will not be asked to provide an in-depth analysis or recommendations because your report is informational in nature. Your information sources will include peer-reviewed scholarly publications that are available in the UBC library. This project includes three team assignments:

1. A proposal with enclosures: a project planning form, preliminary report outline, proposed list of illustrations, and annotated bibliography in the APA documentation style.
2. An oral presentation (see Ch. 23).
3. A formal report (a model for a formal report is included in Ch. 21, pp. 519-30).

### LEARNING OBJECTIVES

By the end of the module, you should be able to do the following:

- Identify an appropriate topic, audience, and purpose for your report

- Describe ethical issues associated with a communication technology and their impact on the individual, the organization, and the public
- Develop a timeline for the project and identify tasks for each team member
- Identify appropriate scholarly literature, expert advice, and other information sources
- Learn the appropriate documentation style and prepare the annotated bibliography
- Demonstrate punctuality, responsibility, appropriate communication etiquette, and behaviour congruent with academic integrity expectations
- Learn the elements of document design and select visuals
- Write a proposal in a memo format with appropriate enclosures
- Provide a preliminary outline for the report and a list of illustrations

### ASSIGNMENT SPECIFICATIONS

Your first task for the project is to send a brief email to the Mech 226 TA about your choice of topic. Your message should include your proposed topic and names of team members; it should not include any irrelevant information. Its purpose is to get your topic approved by the instructor and the TA. Once the topic is approved, it may not be changed without their permission.

Your next task is to prepare an informal proposal. Please use the memo format (see pp. 326-27 in the textbook) and address the memo to your Mech 226 instructor and TA. Make sure to include an informative subject line, headings, appropriate paragraph and line spacing, a running head on each subsequent page, and enclosure notation.

Your proposal should describe your tasks and include the following sections: an introduction, statement of the **topic** and background, **purpose** of the report, **significance** of the topic, **audience**, **scope**, **methods**, **team qualifications** and a **conclusion** (see the model in Fig. 22.2 on pp. 543-44). You will finish by requesting the instructor's authorization for the project.

The word count for the proposal should be between 600-800 words, excluding graphics and enclosures. You should divide the writing tasks.

<b>Note 1. Each student should write a part of the proposal and initial this part (otherwise s/he will get the mark of "zero" for the proposal).</b>
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<b>Note 2. The team leader should print out one copy of the proposal and submit it to the instructor or the teaching assistant. Digital copies will not be accepted.</b>
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### TOPIC, PURPOSE, AND SIGNIFICANCE

Choosing a topic for the project may be quite challenging because it should be about new communication technologies. You should find a topic in which you are genuinely interested and determine what you intend to do in the report (for example, to evaluate or to investigate a new communication technology, or to compare it to existing technologies). Provide some reasons for the importance of this topic and demonstrate the potential usefulness of your report.

Ch. 4 “Weighing the Ethical Issues” (pp. 59-78) discusses the major causes of unethical communication and the potential for communication abuse. It should be the starting point for your research.

Ch. 24 “Blogs, Wikis, and Web Pages” discusses the audience, purpose, and use of internal and external blogs and wikis. It explores the purposes of organizational web pages and describes some global issues, as well as ethical and legal considerations when writing content for the web (pp. 602-16).

Ch. 25 “Social Media” discusses the use of social media for technical communication (pp. 617-27), specifically, Facebook, Google+, LinkedIn and other professional networking sites, Twitter and YouTube.

In order to find information about the use of artificial intelligence in workplace communication or human-computer interaction, you should contact the reference librarians at the Science and Engineering Desk in the Woodward Library ([woodward.library.ubc.ca](http://woodward.library.ubc.ca)) located at 2198 Health Sciences Mall).

## AUDIENCE

Explain that you intend to write your report for the following types of readers: educated lay readers (your instructor and teaching assistant) and your peers (other students in your class). Your document should be sufficiently detailed for the audience to recognize, upon reading it, that you have adequately analyzed the material. At the same time, it must be accessible to an educated lay reader and of interest to other students in your class.

## METHODS

You should get together as a team, choose a team leader and distribute the tasks for the project.

When you are defining and refining your research questions, you should apply the critical thinking process described in Ch. 7, p. 121-35 and shown in Fig. 7.1A and 7.1B on p. 121.

You should ask the right questions, consider a balance of views, and explore your research topic in sufficient detail (see pp. 122-125).

Principles of academic research require that you consult various sources: printed sources, credible digital sources, or experts in the field. Whereas primary sources may not be available, it is very important to find appropriate secondary sources for your research (see pp. 127-33). Using information from just one or two sources is inadequate and, therefore, unacceptable. Instead of relying on a single study, it is important to cross-check each source against similar sources.

Each team member should find at least **three scholarly sources**: publications in which the content is written by experts in a particular field of study. These publications are usually subject to peer-review and can be found through the UBC library search engines and databases.

In the professional context you should demonstrate critical assessment of information sources, so it is your responsibility to evaluate your sources based on currency, accuracy and reliability.

You will find guidelines for evaluating sources in Ch. 8 (pp. 149-52) in the textbook. You should pay special attention to evaluating online information.

When you assess the quality of your findings, you should do the following (adapted from pp. 151-52):

- Determine the sufficiency of the evidence.
- Differentiate “hard” from “soft” evidence.
- Decide whether the presentation of evidence is balanced and reasonable.
- Consider how the facts are being framed.

More information is available on the UBC library site at the following link:

<http://help.library.ubc.ca/evaluating-and-citing-sources/evaluating-information-sources/>

Because [www.wikipedia.com](http://www.wikipedia.com) and [www.howstuffworks.com](http://www.howstuffworks.com) are not scholarly sources, they are not considered to be credible sources of information; for this reason, they are not appropriate for Mech 226 reports. You will find more explanation at the following links:

[http://wiki.ubc.ca/Library:How\\_to\\_Write\\_an\\_Annotated\\_Bibliography](http://wiki.ubc.ca/Library:How_to_Write_an_Annotated_Bibliography)

<http://owl.english.purdue.edu/owl/resource/614/01/>

As a team, you will prepare a list of sources with a brief annotation (summary) of each source. Such a list is called “an annotated bibliography”. It should be prepared in the APA documentation style (pp. 651-63 in the textbook) and enclosed with your proposal (see Encl. 4 below).

When you write a brief summary of each source (up to 100 words) in the annotated bibliography, make sure that you do not lift passages from the original source. Instead, try to paraphrase its content in your own words and explain how and where you will use this source in your report (see the guidelines for avoiding plagiarism on pp. 72-73 in the textbook).

## **CONCLUSION**

In this section you will request authorization for the project and provide your instructor with the team leader’s email address. Indicate that you have enclosed the project planning form, a preliminary report outline, a proposed list of figures, and annotated bibliography. Do not add any other enclosures. After your proposal has been approved, you will likely expand the outline. Be sure to discuss all subsequent changes of the outline with your instructor or TA.

Encls: 1. Project Planning Form

2. Preliminary Report Outline

3. Proposed List of Illustrations

4. Annotated Bibliography in the APA documentation style

## ENCLOSURE 1: PROJECT PLANNING FORM

Read Ch. 5 “Teamwork and Global Considerations” and prepare a project planning form that will describe the goal of the project, break it down into manageable phases, and help you manage them.

This form will indicate the allocation of tasks among team members (see a tentative list of tasks for the formal report in Fig. 1 below). One of these tasks is writing report sections.

**Each student should write at least one section of the report (otherwise s/he will get “zero” for the report).**

Your project planning form should indicate specific dates for certain tasks. It should explain how you will resolve disputes, evaluate performance, and maintain records (meeting logs, drafts). This is important in order to set out the “ground rules” for collaboration.

Fig. 5.1 on p. 84 shows the structure of the project planning form. It is provided to you as a model, and your project might not include every step indicated there. However, it might require additional steps, e.g. the preparation of the letter of transmittal (p. 515), as well as front matter (p. 515) and end matter (p. 516) supplements. You can also add a Gantt chart or a PERT chart (p. 257) to the project planning form.

<b>Team Tasks</b>  1. Select an appropriate topic. 2. Peer-review and discuss drafts. 3. Edit and proof-read the report.	<b>Member 1/ Team Leader</b>  1. Keep logs of team meetings. 2. Track the progress of work completed. 3. Research, draft, revise and proof-read one section. 4. Prepare the letter of transmittal and the abstract. 5. Print, assemble, and submit the report to the instructor.
	<b>Member 2/ Chief Editor</b>  1. Research, draft, revise and proof-read one section. 2. Collect drafts from other team members. 3. Review drafts and allocate editing tasks. 4. Write the introduction and conclusion.
	<b>Member 3/ Graphics and Layout Editor</b>  1. Research, draft, revise and proof-read one section. 2. Prepare, collect and edit all graphics for the report. 3. Provide sources and references for all graphics. 4. Prepare the list of illustrations. 5. Ensure consistency in document layout and format.
	<b>Member 4/ Front and End Matter Editor</b>  1. Research, draft, revise and proof-read one section. 2. Compile the list of references 3. Prepare the front and end matter (title page, table of contents, glossary of technical terms, list of symbols and abbreviations, and appendices, if required).

Fig. 1: Tasks for the Formal Report

## ENCLOSURE 2: PRELIMINARY REPORT OUTLINE

Prepare an outline of your formal report, **indicating all headings and subheadings that you want to include**. This outline will become the Table of Contents of your report.

Use the **decimal outline** format shown below and on p. 189 in the textbook. The decimal system with indentation makes it easier to refer readers to specifically numbered sections. Please note that not every heading should be numbered – front- and end-matter headings are not numbered. Make sure that the introduction has no subdivisions.

Use a **short descriptive phrase for first-order and second-order headings** in sections 2.0, 3.0, etc. Double check that the headings and subheadings are parallel in structure and meaning. If you wish to elaborate upon the content of particular sections, include notes (in a **sentence outline** format) and place them on the right side of the page, using bullets rather than decimal numbers. You can subdivide the conclusion into the summary of findings and the interpretation of findings (see p. 530), but you should not include any recommendations. Delete excessive white space. Submit your outline as an enclosure with your proposal. Once your instructor has reviewed your preliminary outline, please do not make any substantive changes to it without advising the instructor\*.

ABSTRACT	(N.B.: 14-pt type)
LIST OF FIGURES [or ILLUSTRATIONS]	
GLOSSARY	(probably required)
LIST OF ABBREVIATIONS	(possibly required)
1.0 INTRODUCTION	(the first numbered primary heading – no subdivisions)
2.0 FIRST ORDER HEADING	
2.1 SECOND ORDER (SECONDARY) HEADING	(N.B.: 12-pt type)
2.2 SECOND ORDER HEADING	
2.2.1 Third Order (Tertiary) Heading	
2.2.2 Third Order Heading	
3.0 FIRST ORDER HEADING	
4.0 CONCLUSION	(the last numbered primary heading)
REFERENCES	(required)
APPENDIX: [TITLE]	(possibly required)

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\* In the workplace, it is advisable not to change any first order headings after you have shared your report outline with your client. Changing first order headings will change the nature of your report, and the client may feel misled. He/she has agreed to a report that differs from what you have delivered. As a result, the client may lodge a complaint against you.

### ENCLOSURE 3: PROPOSED LIST OF ILLUSTRATIONS

Provide a separate list of proposed illustrations that you intend to include in the report. These illustrations will include all tables, figures, drawings, photos, etc. If you are listing figures only, be sure to call this page List of Figures.

**Note: Only a list is required, so you should not include any illustrations here.**

At this point, you may not have page numbers, but preparing such a list will help you organize your information. You will add page numbers after you complete the formal report.

#### TABLES

Table 1. [provide a possible title for Table 1 here]

Table 2. [provide a possible title for Table 2 here]

Table 3. [provide a possible title for Table 3 here]

#### FIGURES

Figure 1. [provide a possible title for Figure 1 here]

Figure 2. [provide a possible title for Figure 2 here]

Figure 3. [provide a possible title for Figure 3 here]

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### ENCLOSURE 4: ANNOTATED BIBLIOGRAPHY

There are five steps for preparing the annotated bibliography:

1. Find relevant, reliable and recent scholarly sources (published in 2012-2017).
2. Organize these sources alphabetically.
3. Begin each source with its bibliographic information **formatted in the APA style** -  
- <http://wiki.ubc.ca/images/6/6f/Apastyle.pdf>
4. Summarize each source briefly (approx. 100 words).
5. Explain how you will use this source in your report (25 words).