Informal Reports

- A report is a structured presentation of factual information intended for various audiences.

- Informal reports are typically used within an organization, summarizing events or documenting progress on specific projects or during certain time periods.

	Informal Report	Formal Report
Length	Short in length. Usually completed in a page or two.	Not to be completed in a page or two. Includes TOC
Nature	Deals with the routine matters	Deals with complex problems
Reader	Usually written for someone within' the organization.	Written for within the organization or outside
Format	written as memorandum and letter	Written in a manuscript format.
Formality	Does not require extended planning.	Needs planning before writing
Use of Supplement	Does not include prefatory parts\nor appended once because it presents only day-to-day events.	Include these special parts to increase the reliability and validity of the report.
Style	Personal writing styles (using first or second person style) can be used.	Are written using impersonal (using third person style) styles

Types of Informal Reports

1. **Informative Reports**

   - **Progress Report:** Tracks the progress of a project or task over a certain period.

   - **Trip/Activity Report:** Summarizes information gathered from a trip or an activity.

2. **Analysis Reports**

   - **Feasibility Studies:** Assesses the practicality or potential success of a proposed project or plan.

   - **Problem Analysis:** Examines a particular problem and offers analysis.

   - **Equipment Evaluation:** Evaluates the performance and usability of equipment.

Guidelines for Informal Reports

- **Plan Well Before Writing:** Have a clear purpose and understanding of the report's objectives.

- **Use Letter or Memo Format:** Informal reports often follow simpler formats like letters or memos, making them concise and clear.

- **Make Text Visually Appealing:** Ensure the report is well-structured with headings, bullet points, and white spaces to improve readability.

- **ABC Format for Organization:**
  - **A:** Abstract/Introduction: Summarizes the purpose and key points.
  - **B:** Body: Contains the important details and information.
  - **C:** Conclusion: Focuses attention on the main findings and outcomes.
- **Introductory Summary:** Include a brief overview in the introduction to highlight the main points.
- **Separate Fact from Opinion:** Ensure that facts are clearly distinguishable from opinions or recommendations.
- **Use Attachments:** Add attachments for additional or less important details that support the main report.
- **Edit Carefully:** Proofread the report to ensure clarity, accuracy, and professionalism.

Activity Reports

Definition:

- Activity reports are documents written at regular intervals (weekly, monthly, or quarterly) that summarize ongoing tasks, specific activities, or special projects.
- These reports may serve to inform others within the organization or be used for record-keeping purposes, such as employment evaluations or time tracking.

Purpose of Activity Reports:

- **Ongoing Tasks:** To document regular activities and provide an update on their status.
- **Specific Activities:** To highlight notable work completed during a specific period.
- **Special Projects:** To track the progress and accomplishments of projects outside normal tasks.
- **Accomplishments:** To record achievements of individuals or departments for performance evaluation or billing purposes.

Types of Activity Reports:

1. **Periodic Reports:**
2. **Trip Reports:**
3. **Incident Reports:**

Reader:

- **Supervisors**
- **Managers**
- **Colleagues**

ABC Format: Activity Reports

- **ABSTRACT:** Time period, project, or event covered in report.
- **BODY:** List of activities or events
  - Organization that emphasizes type of activity, by project, or by client
  - Problems important to reader
- **CONCLUSION:** Future actions
  - Actions for continuing and ongoing activities
  - Plans for addressing problems or for the time period covered by the next report

Progress Reports

Definition:

- Progress reports are informal reports that provide updates on the work completed for a specific project. They are often agreed upon at the start of a project and submitted at regular intervals.

Purpose:

- **Tracking Progress:** To inform supervisors or clients about the current status of a project, outlining what has been completed so far.
- **Final Progress Report:** The last progress report is usually submitted upon project completion and is often called a **Project Completion Report**.

Key Features:

- **Objective Data:** Progress reports focus on facts and actual developments in the project.
- **Persuasive Writing:** Although objective, these reports are often written in a manner that persuades the reader that the project is on track or that any challenges will be overcome.

Content of Progress Reports:

- **Work Details:** Include information about the work completed, the current status, and any upcoming tasks.
- **Challenges:** Mention any obstacles or delays encountered and how they are being addressed.
- **Next Steps:** Outline what work is planned for the next phase of the project.

Readers:

- **Supervisors**
- **Clients**

ABC Format: Progress Report

- **ABSTRACT:** Project and general progress (e.g., second week of a four-week project)
  - Capsule summary of main project(s)
  - Main progress to date or since last report
- **BODY:** Description of work completed since last report
  - Organization emphasizes task, chronology, or both
  - Clear reference to any dead ends that may have taken considerable time but yielded no results
  - Explanation of delays or incomplete work
  - Description of work remaining on project(s), organized by task, by time, or by both
  - Reference to attachments that may contain more specific information
- **CONCLUSION:** Brief restatement of work since last reporting period
  - Expression of confidence or concern about overall work on project(s)
  - Indication of your willingness to make any adjustments the reader may want to suggest

Problem Analysis

Definition:

- A report providing a detailed description of problems related to personnel, equipment, products, or services, aimed at helping readers decide the next steps.

Purpose:

- To offer objective information about a problem, allowing the reader to make informed decisions.
- Opinions must be supported by facts and evidence.

Key Points:

- Presents facts clearly.
- Helps in problem identification and evaluation.
- The report may suggest potential solutions based on the information provided.

ABC Format: Problem Analysis

- **ABSTRACT:** Purpose of report
  - Capsule summary of problems covered in report discussion
- **BODY:** Background on source of problems
  - Well-organized description of the problems observed
  - Data that support your observations
  - Consequences of the problems
- **CONCLUSION:** Brief restatement of main problems (unless report is so short that such restatement would seem repetitious)
  - Degree of urgency required in handling problems
  - Suggested next step

Equipment Evaluation

Definition:

- An informal report assessing the performance of equipment, including machinery, tools, vehicles, office supplies, or computer systems.

Purpose:

- To provide objective data about how well (or poorly) equipment has performed.

Report Focus:

- May focus solely on problems with the equipment or recommend solutions.
- The evaluation should be well-documented, detailing the equipment's exact performance and functionality.

Uses:

- Equipment evaluation reports may suggest improvements or changes based on the findings.

> ### ABC Format: Equipment Evaluation
>
> - **ABSTRACT:** Purpose of report
>   - Capsule summary of what your report says about the equipment
>   - Reason for the evaluation
> - **BODY:** Thorough description of the equipment being evaluated
>   - Well-organized critique, either analyzing the parts of one piece of equipment or contrasting several pieces of similar equipment according to selected criteria
>   - Additional supporting data, with reference to any attachments
> - **CONCLUSION:** Brief restatement of major findings, conclusions, or recommendations

Feasibility Studies

Definition:

- A report assessing the practicality of a proposed policy, product, service, or organizational change.

Purpose:

- To help readers decide whether to adopt or reject a proposed idea by evaluating costs, alternatives, and potential effects.

Key Features:

- **Objectivity:** Must reflect the factual, objective nature of a report.
- **Guidance for Decisions:** Compares multiple alternatives to guide readers toward informed decisions.

Process:

1. **Prompted by a Proposal:** Often initiated after identifying a problem or suggestion.
2. **Compares Alternatives:** Lays out various options without advocating strongly for one.
3. **Leads to Action:** If feasible, the study may result in further steps like developing guidelines or training materials.

Follow-Up:

- Feasibility studies may follow a **problem analysis** or recommendation report and be followed by a detailed action plan if the proposed solution is viable.

ABC Format: Feasibility Study

- **ABSTRACT:** Capsule summary of information for the most important readers (i.e., the decision makers)

  - Brief statement about who has authorized the study and for what purpose
  - Brief mention of the criteria used during the evaluation
  - Brief reference to your recommendation

- **BODY:** Details that support whatever conclusions and recommendations the study contains, working logically from fact toward opinion

  - Organization that compares advantages and disadvantages of each option
  - Description of evaluation criteria used during your study
  - Description of exactly *what* was evaluated and *how*, especially if you are comparing several items

- **CONCLUSION:** Wrap-up in which you state conclusions and recommendations resulting from the study