

Informal Reports

CHAPTER: 11

12 Post Street
Houston Texas 77000
(713) 555-9781

April 22, 2012

Big Muddy Oil Company Inc
12 Rankin St
Abilene TX 79224

ATTENTION: Mr. James Smith, Engineering Manager

**SHARK PASS STUDY
BLOCK 15, AREA 43-B
GULF OF MEXICO**

Includes specific title.

Uses optional heading
for abstract part of
ABC format.

Draws attention to main
point of report.

Gives on-site details of
project—dates, location,
tasks.

Uses lead-in to subsec-
tions that follow.

Highlights most impor-
tant point about soil
layer—that is, the weak
clay.

INTRODUCTORY SUMMARY

You recently asked our firm to complete a preliminary soils investigation at an off-shore rig site. This report presents the tentative results of our study, including major conclusions and recommendations. A longer, formal report will follow at the end of the project.

On the basis of what we have learned so far, it is our opinion that you can safely place an oil platform at the Shark Pass site. To limit the chance of a rig leg punching into the seafloor, however, we suggest you follow the recommendations in this report.

WORK AT THE PROJECT SITE

On April 15 and 16, 2012, M-Global's engineers and technicians worked at the Block 15 site in the Shark Pass region of the gulf. Using M-Global's leased drill ship, Seeker II, as a base of operations, our crew performed these main tasks:

- Seismic survey of the project study area
- Two soil borings of 40 feet each

Both seismic data and soil samples were brought to our Houston office the next day for laboratory analysis.

LABORATORY ANALYSIS

On April 17 and 18, our lab staff examined the soil samples, completed bearing capacity tests, and evaluated seismic data. Here are the results of that analysis.

Soil Layers

Our initial evaluation of the soil samples reveals a 7- to 9-foot layer of weak clay starting a few feet below the seafloor. Other than that layer, the composition of the soils seems fairly typical of other sites nearby.

Bearing Capacity

We used the most reliable procedure available, the XYZ method, to determine the soil's bearing capacity (i.e., its ability to withstand the weight of a loaded oil rig). That method required that we apply the following formula:

$$Q = cNv + tY, \text{ where}$$

Q = ultimate bearing capacity

c = average cohesive shear strength

Nv = the dimensionless bearing capacity factor

t = footing displacement

Y = weight of the soil unit

The final bearing capacity figure will be submitted in the final report, after we repeat the tests.

Seafloor Surface

By pulling our underwater seismometer back and forth across the project site, we developed a seismic "map" of the seafloor surface. That map seems typical of the flat floor expected in that area of the gulf. The only exception is the presence of what appears to be a small sunken boat. This wreck, however, is not in the immediate area of the proposed platform site.

CONCLUSIONS AND RECOMMENDATIONS

Based on our analysis, we conclude that there is only a slight risk of instability at the site. Although unlikely, it is possible that a rig leg could punch through the seafloor, either during or after loading. We base this opinion on (1) the existence of the weak clay layer, noted earlier, and (2) the marginal bearing capacity.

Nevertheless, we believe you can still place your platform if you follow careful rig-loading procedures. Specifically, take these precautions to reduce your risk:

1. Load the rig in 10-ton increments, waiting 1 hour between loadings.
2. Allow the rig to stand 24 hours after the loading and before placement of workers on board.
3. Have a soils specialist observe the entire loading process to assist with any emergency decisions if problems arise.

As noted at the outset, these conclusions and recommendations are based on preliminary data and analysis. We will complete our final study in three weeks and submit a formal report shortly thereafter.

M-Global, Inc., enjoyed working once again for Big Muddy Oil at its Gulf of Mexico lease holdings. I will phone you this week to see if you have any questions about our study. If you need information before then, please give me a call.

Sincerely,

Bartley Hopkins

Bartley Hopkins, Project Manager

M-Global, Inc.

hg

Notes why
method w/
i.e., reliab...

Explains b/
mapping p/
done and u/
produced.

Restates p/
body) that
conclusion

Uses list to/
recommen/
reduce risk.

Again men/
tive nature/
tion, to pre/
of report.

Maintains/
shows init/
offering to

TO: Gary Lane
 FROM: Jeff Bilstrom *JB*
 SUBJECT: Creation of Logo for Montrose Service Center
 DATE: October 3, 2012

Gives concise view of problem—and his proposed solution.

Part of my job as director of public relations is to get the Montrose name firmly entrenched in the minds of metro Atlanta residents. Having recently reviewed the contacts we have with the public, I believe we are sending a confusing message about the many services we offer retired citizens in this area.

To remedy the problem, I propose we adopt a logo to serve as an umbrella for all services and agencies supported by the Montrose Service Center. This proposal gives details about the problem and the proposed solution, including costs.

The Problem

The lack of a logo presents a number of problems related to marketing the center's services and informing the public. Here are a few:

- The letterhead mentions the organization's name in small type, with none of the impact that an accompanying logo would have.
- The current brochure needs the flair that could be provided by a logo on the cover page, rather than just the page of text and headings that we now have.
- Our 14 vehicles are difficult to identify because there is only the lettered organization name on the sides without any readily identifiable graphic.
- The sign in front of our campus, a main piece of free advertising, could better spread the word about Montrose if it contained a catchy logo.
- Other signs around campus could display the logo, as a way of reinforcing our identity and labeling buildings.

Includes effective lead-in.

Uses bulleted list to highlight main difficulties posed by current situation.

It's clear that without a logo, the Montrose Service Center misses an excellent opportunity to educate the public about its services.

Ends section with good transition to next section.

Starts with main point—need for logo.

The Solution

I believe a professionally designed logo could give the Montrose Service Center a more distinct identity. Helping to tie together all branches of our operation, it would give the public an easy-to-recognize symbol. As a result, there would be a stronger awareness of the center on the part of potential users and financial contributors.

The new logo could be used immediately to do the following:

- Design and print letterhead, envelopes, business cards, and a new brochure.
- Develop a decal for all company vehicles that would identify them as belonging to Montrose.
- Develop new signs for the entire campus, to include a new sign for the sign in front of the campus, one sign at the entrance to the Blane Workshop, and one sign at the entrance to the Administration Building.

Cost

Developing a new logo can be quite expensive. However, I have been able to get the name of a well-respected graphic artist in Atlanta who is willing to do the services in the creation of a new logo. All that we must do is give him some general guidelines to follow and then choose among 8–10 rough sketches. Once a design is made, the artist will provide a camera-ready copy of the new logo.

• Design charge	\$0.00
• Charge for new letterhead, envelopes, business cards, and brochures (min. order)	545.65
• Decal for vehicles 14 @ \$50.00 + 4%	728.00
• Signs for campus	415.28
Total Cost	\$1,688.93

Conclusion

As the retirement population of Atlanta increases in the next few years, there will be a much greater need for the services of the Montrose Service Center. Because of that need, it's in our best interests to keep this growing market informed about our organization.

I'll stop by later this week to discuss any questions you might have about this proposal.

Informal Reports

Usually directed within your own organization, which summarizes an event or records work on a specific project or during a specific time period

Informative Reports

- Progress Report
- Trip/ Activity Report

Analysis Reports

- Feasibility Studies
- Problem Analysis
- Equipment Evaluation

	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

Activity Report

Let's start with the first type of informal reports

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

Case Study

- ◆ Nancy Fairbanks is simply submitting her usual monthly report. The greatest challenge in such reports is to classify, divide, and label information in such a way that readers can find what they need quickly. Fairbanks selected the kind of substantive headings that help the reader locate information (e.g., “Jones Fill Project,” “Performance Reviews”).

TO: Ralph Buzby, Manager of Engineering
FROM: Nancy Fairbanks, Project Manager /F
DATE: August 1, 2012
SUBJECT: Activity Report for July 2012

Ralph Buzby
August 1, 2012
Page 2

July has been a busy month in our group. Besides starting and finishing many smaller jobs, we completed the Jones Fill project. Also, the John Lewis Dam borings began just a week ago. Finally, I did some marketing work and several performance reviews.

SMALL PROJECTS

Last month, my group completed nine small projects, each with a budget under \$20,000 and each lasting only a few days. These jobs were in three main areas:

- 1 Surveying subdivisions—five jobs
- 2 Taking samples from toxic sites—two jobs
- 3 Doing nearby soil borings—two jobs

All nine were completed within budget. Eight of the nine projects were completed on time. The Campbell County survey, however, was delayed for a day because of storms on July 10.

JONES FILL PROJECT

Our written report on this 12-month job was finally submitted to Trunk Engineering, Inc., on July 23. The delay was caused by Trunk's decision to change the scope of the project again. The firm wanted another soil boring, which we completed on July 22.

JOHN LEWIS DAM PROJECT

As you know, we had hoped to start work at the dam site last month. However, the client decided to make many design changes that had to be approved by subcontractors. The final approval to start came just last week; thus our first day on-site was July 28.

MARKETING

During July, my main marketing effort was to meet with some previous clients, acquainting them with some of our new services. I met with eight different clients at their offices, with two meetings occurring on each of these dates: July 15, 16, 22, and 23. There's a good possibility that several of these meetings will lead to additional waste-management work in the next few months.

PERFORMANCE REVIEWS

As we discussed last month, I fell behind on my staff's performance reviews in June. In July, I completed the three delayed reviews, as well as the four that were due in July. Copies of the paperwork were sent to your office and to the Personnel Department on July 18. This brings us up to date on all performance reviews.

CONCLUSION

July was a busy month in almost all phases of my job. Because of this pace, I haven't had time to work on the in-house training course you asked me to develop. In fact, I'm concerned that time I devote to that project will take me away from my ongoing client jobs. At our next meeting, perhaps we should brainstorm about some solutions to this problem.

Write the conclusion for this report.

Progress Reort

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

Case Study

Scott Sampson, M-Global's personnel manager, is in the midst of an internal project being conducted for Jeannie McDuff, Vice President of Domestic Operations. Sampson's goal is to find ways to improve the company's training for technical employees. Having completed two of three phases, he is reporting his progress to McDuff. Note that Sampson organizes the body sections by task. This arrangement helps focus the reader's attention on the two main accomplishments—the successful phone interviews and the potentially useful survey. Also note that Sampson adopts a persuasive tone at the end of the report—that is, he uses his solid progress as a way to emphasize the importance of the project. In this sense, he is “selling” the project to his “internal customer,” Jeannie McDuff, who ultimately is in the position to make decisions about the future of technical training at M₁₂-Global.

To: Jeannie McCull, Vice President of Domestic Operations
From: Scott Sampson, Manager of Personnel SS
Date: June 11, 2012
Subject: Progress Report on Training Project

INTRODUCTORY SUMMARY

On May 21, you asked that I study ways our firm can improve training for technical employees in all domestic offices. We agreed that the project would take about six or seven weeks and involve three phases:

Phase 1: Make phone inquiries to competing firms.

Phase 2: Send a survey to our technical people.

Phase 3: Interview a cross section of our technical employees.

I have now completed Phase 1 and part of Phase 2. My observation thus far is that the project will offer many new directions to consider for our technical training program.

WORK COMPLETED

In the first week of the project, I had extensive phone conversations with people at three competing firms about their training programs. Then, in the second week, I wrote and sent out a training survey to all technical employees in M-Global's domestic offices.

Phone Interviews

I contacted three firms for whom we have done similar favors in the past: Simkins Consultants, Judd & Associates, and ABG Engineering. Here is a summary of my conversations:

1. Simkins Consultants

Talked with Harry Roland, Training Director, on May 22. Harry said that his firm has most success with internal training seminars. Each technical person completes several one- or two-day seminars every year. These courses are conducted by in-house experts or external consultants, depending on the specialty.

2. Judd & Associates

Talked with Jan Tyler, Manager of Engineering, on May 23. Jan said that Judd, like Simkins, depends mostly on internal seminars. But Judd spreads these seminars over one or two weeks, rather than teaching intensive courses in one or two days. Judd also offers short "technical awareness" sessions during the lunch hour every two weeks. In-house technical experts give informal presen-

Newt, ABG's training program is much as it was two decades ago. Most technical people at high levels go to one seminar a year, usually sponsored by professional societies or local colleges. Other technical people get little training beyond what is provided on the job. In-house training has not worked well, mainly because of schedule conflicts with engineering jobs.

Internal Survey

After completing the phone interviews noted, I began the survey phase of the project. Last week, I finished writing the survey, had it reproduced, and sent it with a cover memo to all 450 technical employees in domestic offices. The deadline for returning it to me is June 17.

Work Planned

With phone interviews finished and the survey mailed, I foresee the following schedule for completing the project:

June 17:	Surveys returned
June 18–20:	Surveys evaluated
June 23–27:	Trips taken to all domestic offices to interview a cross section of technical employees
July 3:	Submission of final project report to you

CONCLUSION

My interviews with competitors gave me a good feel for what technical training might be appropriate for our staff. Now I am hoping for a high-percentage return on the internal survey. That phase will prepare a good foundation for my on-site interviews later this month. I believe this major corporate effort will upgrade our technical training considerably.

I would be glad to hear any suggestions you may have about my work on the rest of the project. For example, please call if you have any particular questions you want asked during the on-site interviews (ext. 348).

Analysis Reports

1. Feasibility Studies
2. Problem Analysis
3. Equipment Evaluation

Problem Analysis

A report that presents readers with a detailed description of problems in areas such as personnel, equipment, products, and services.

Its main goal is to provide objective information so that the readers can choose the next step. Any opinions must be well supported by facts.

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

Case Study

Harold Marshal, a longtime M-Global employee, supervises all technical work aboard the Seeker II, a boat that M-Global leases during the summer. Staffed with several technicians and engineers, the boat is used to collect and test soil samples from the ocean floor. Different clients purchase these data, such as oil companies that must place oil rigs safely and telecommunications companies that must lay cable.

After a summer on the Seeker II, Harold has severe reservations about the safety and technical adequacy of the boat. Yet he knows that his supervisor, Jan Stillwright, will require detailed support of any complaints before she seriously considers negotiating a new boat contract next season. Given this critical audience, Harold focuses on specific problems that affect (1) the safety of the crew, (2) the accuracy of the technical work performed, and (3) the morale of the crew. He believes that this pragmatic approach, rather than an emotional appeal, will best persuade his boss that the problem is serious.

TO: Jan Stillwright, Vice President of Research and Training
FROM: Harold Marshal, Technical Supervisor HM
DATE: October 15, 2012
SUBJECT: Boat Problems During Summer Season

Gives abstract (or summary) in first paragraph.

Provides capsule listing of problems discussed in report.

Opens with most important point—then qualifies it. Explains problem in layperson's language, indicating possible consequences.

INTRODUCTORY SUMMARY

- We have just completed a one-month project aboard the leased ship, *Seeker II*, in the Pacific Ocean. All work went just about as planned, with very few delays caused by weather or equipment failure.
- However, there were some boat problems that need to be solved before we lease *Seeker II* again this season. This report highlights the problems so that they can be brought to the owner's attention. My comments focus on four areas of the boat: drill rig, engineering lab, main engine, and crew quarters.

DRILL RIG

- Thus far, the rig has operated without incident. Yet on one occasion, I noticed that the elevator for lifting pipe up the derrick swung too close to the derrick itself. A quick gust of wind or a sudden increase in sea height caused these shifts. If the elevator were to hit the derrick, causing the elevator door to open, pipe sections might fall to the deck below.

I believe the whole rig assembly needs to be checked over by someone knowledgeable about its design. Before we put men near that rig again, we need to know that their safety would not be jeopardized by the possibility of falling pipe.

Bedroom

Three of the top bunks had such poor springs that the occupants sank 6 to 12 inches toward the bottom bunks. More important, five of the bunks are not structurally sound enough to keep from swaying in medium to high seas. Finally, most of the locker handles are either broken or about to break.

Describes three problem areas in great detail—knowing the owner will want facts to support complaints.

Bathroom

Poor pressure in three of the commodes made them almost unusable during the last two weeks. Our amateur repairs did not solve the problem, so I think the plumbing leading to the holding tank might be defective.

Laundry Room

We discovered early that the filtering system could not screen the large amount of rust in the old 10,000-gallon tank. Consequently, undergarments and other white clothes turned a yellow-red color and were ruined.

CONCLUSION

As noted at the outset, none of these problems kept us from accomplishing the major goals of this voyage, but they did make the trip much more uncomfortable than it had to be. Moreover, in the case of the rig and engine problems, we were fortunate that injuries and downtime did not occur.

I strongly urge that the owner be asked to correct these deficiencies before we consider using *Seeker II* for additional projects this season.

Briefly restates problem, with emphasis on safety and profits.

Ends with specific recommendation.

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

Case Study

- ◆ Like other firms, M-Global relies on word processing for almost all internal and external documents. It is an evaluation of a new word-processing package used on a trial basis. Melanie Frank, office manager in San Francisco, conducted the trial in her office and wrote the report to the branch manager, Hank Worley. Note that she analyzes each of the software's five main features and then ends with a recommendation, much as in a recommendation report.

DATE: July 25, 2013
TO: Hank Worley, Project Manager
FROM: Melanie Frank, Office Manager MF
SUBJECT: Evaluation of Best Choice Software

Uses optional first heading for abstract section of ABC format.
Gives background, main points, and scope statement.

Notes five main criteria to be evaluated.

Begins paragraph with most important point.
Supports claim with evidence.

INTRODUCTORY SUMMARY

When the office purchased one copy of Best Choice Software last month, you suggested I send you an evaluation after 30 days' use. Having now used Best Choice for a month, I have concluded that it meets all our performance expectations. This memo presents our evaluation of the main features of Best Choice.

HOW BEST CHOICE HELPED US

Best Choice provides five primary features: word processing, file management, spreadsheet, graphics, and a user's guide. My critique of all five features is included here.

Word Processing

The system contains an excellent word-processing package that the engineers as well as the secretaries have been able to learn easily. This package can handle both our routine correspondence and the lengthy reports that our group generates. Of particular help is the system's 90,000-word dictionary, which can be updated at any time. The spelling correction feature has already saved much effort that was previously devoted to mechanical editing.

Uses specific example to document opinion.



File Management

The file-manager function allows the user to enter information and then to manipulate it quickly. During one three-day site visit, for example, a field engineer recorded a series of problems observed in the field. Then she rearranged the data to highlight specific points I asked her to study, such as I-beam welds and concrete cracks.

Gives simple explanation of how spreadsheet works.



Spreadsheet

Like the system's word-processing package, the spreadsheet is efficient and quickly learned. Because Best Choice is a multipurpose software package, spreadsheet data can be incorporated into letter or report format. In other words, spreadsheet information can be merged with our document format to create a final draft for submission to clients or supervisors, with a real savings in time. For example, the memo I sent you last week on budget projections for field equipment took me only an hour to complete; last quarter, the identical project took four hours.

Graphics

The graphics package permits visuals to be drawn from the data contained in the spreadsheet. For example, a pie chart that shows the breakdown of a project budget can be created easily by merging spreadsheet data with the graphics software. With visuals becoming such an important part of reports, we have used this feature of Best Choice quite frequently.

Shows relevance of graphics to current work.

User's Guide

Eight employees in my group have now used the Best Choice user's guide. All have found it well laid out and thorough. Perhaps the best indication of this fact is that in 30 days of daily use, we have placed only three calls to the Best Choice customer-service number.

Supplies strong supporting statistic.

CONCLUSION

Best Choice seems to contain just the right combination of tools to help us do our job, both in the field and in the office. These are the system's main benefits:

- Versatility—it has diverse functions
- Simplicity—it is easy to master

Wraps up report by restating main points.

The people in our group have been very pleased with the package during this 30-day trial. If you like, we would be glad to evaluate Best Choice for a longer period.

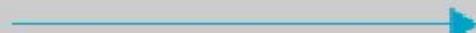
Offers follow-up effort.

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

Feasibility of Using Open-Source Software at M-Global

Uses formal document format appropriate for scope of project and length of report.



Prepared for:

Greg Bass, Director of Information Systems

Prepared by:

Kellen Holmes and Kate Newman

MEMO

To: Greg Bass
From: Kellen Holmes and Kate Newman
Date: April 20, 2012
Subject: Feasibility Report for Open-Source Software

Enclosed is the study that you requested of the feasibility of open-source software at M-Global. There are many options available to us, but we believe that some open-source software could meet our needs and save on license fees.

Explains context of the feasibility study.

We should, however, be aware of the limitations of such software and of the different nature of technical support with this kind of software. We will not be able to turn to a vendor for technical support; instead, we will need to look to the community of users or create our own solutions. We believe that M-Global has the resources to support open-source software and even to contribute to the open-source software community.

Includes sources that are not cited in the report, but that may have provided useful background information.

We will be happy to meet with you to discuss our findings.

Invites follow-up meeting.

Chapter: 10 – Formal Reports

ABC Format: Formal Document

■ ABSTRACT:

- Cover/title page
- Letter or memo of transmittal
- Table of contents
- List of illustrations
- Executive summary
- Introduction

■ BODY:

- Discussion sections
- [Appendices—appear after text but support the body section]

■ CONCLUSION:

- Conclusions (for reports and proposals)
- Recommendations (for reports only)

Formal Report

FYP

Cover/title page

Letter or memo of transmittal

Table of contents

List of illustrations

Executive summary

Introduction

Discussion sections

Conclusions and recommendations

End material

Title Page

Undertaking

Table of contents

List of Tables

List of Figures

Abstract

Introduction (Chapter- 1)

Literature Review (Chapter-2)

Requirements and Design (Chapter: 3)

Implementation and Test Scores (Chapter: 4)

Results and Analysis (Chapter: -5)

Conclusions (Chapter-6)

References

Appendix

MEMO

TO: Karrie Camp, Vice President for Human Resources|
FROM : Abe Andrews, Personnel Assistant *aa*
SUBJECT: Report on Flextime Pilot Program at Boston Office
DATE: March 18, 2012

As you requested, I have examined the results of the six-month pilot program to introduce flextime to the Boston office. This report presents my data and conclusions about the use of flexible work schedules.

To determine the results of the pilot program, I asked all employees to complete a written survey. Then I followed up by interviewing every fifth person on an alphabetical list of office personnel. Overall, it appears that flextime has met with clear approval by employees at all levels. Productivity has increased and morale has soared. This report uses the survey and interview data to suggest why these results have occurred and where we might go from here.

I enjoyed working on this personnel study because of its potential impact on the way M-Global conducts business. Please give me a call if you would like additional details about the study.



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In-text citation

Corrosion is defined as a 'chemical action which harms the properties of a metal' (Glendinning 1973, p.12). Because corrosion reduces the life of the material and protection procedures are expensive, special corrosion-resistant metals have been developed, including Monel metals which are particularly suited to marine applications (Glendinning 1973).

Reference list entry

Glendinning, E.H. 1973 *English in mechanical engineering*, Oxford, Oxford University Press.

1.Writing an ABSTRACT

FORMAL REPORT WRITING

“ Qualities of a Good Abstract

Uses one well developed paragraph which is unified, coherent, concise, and able to stand alone.

Uses an introduction/body/conclusion structure which presents the article, paper, or report's purpose, method, Results, conclusion(s), and recommendations in that order.

Follows strictly the chronology of the article, paper, or report.

Provides logical connections (or transitions) between the information included.

Adds no new information, but simply summarizes the report.

Is understandable to a wide audience.

Any major restrictions or limitations on the results should be stated, if only by using "weasel-words" such as "might", "could", "may", and "seem".

Abstract Components

Brief Background (optional)

Reason for writing	What is the importance of the research? Why would a reader be interested in the larger work?
Problem	(Optional) What problem does this work attempt to solve? What is the scope of the project? What is the main argument/thesis/claim?
Methodology	An abstract of a scientific work may include specific models or approaches used in the larger study.
Results/ Findings/ Implementation	An abstract of a scientific work may include specific data that indicates the results of the project.
Conclusion and Implications	What changes should be implemented as a result of the findings of the work?

Sample Abstract

This study's **objective** was to determine the strangeness measurements for red, green, and blue quarks. The Britt-Cushman **method** for quark analysis exploded a quarkstream in a He gas cloud. **Results** indicate that both red and green quarks had a strangeness that differed by less than 0.453×10^{-17} Zabes/m² for all measurements. Blue quarks remained immeasurable, since their particle traces bent into 7-tuple space. This study's **conclusions** indicate that red and green quarks can be used interchangeably in all He stream applications, and **further studies** must be done to measure the strangeness of blue quarks.

Technical Research

Chapter: 9

Features	Writing prompt	Purpose	Audience	Sources	Publication format
Academic writing	General topic assigned by the teacher	Communicating what the student knows about the topic, to earn a high grade	The teacher who assigned the project	Secondary sources, for the most part	Academic papers Presentations and posters at academic conferences
Workplace writing	Specific workplace situation, question, or problem raised by the writer or by a supervisor	Providing information needed to answer a question or make a decision	Often several people with differing professional backgrounds	Secondary sources serve as foundation for primary research	Reports Proposals Workplace presentations Presentations and posters at professional conferences

Quantitative Research

- In technical communication, this step often involves answering questions about how long it takes to perform a task. Technical communicators may also collect and analyze statistics from surveys and interviews. Quantitative research is judged by validity and reliability.
- Research is valid if it measures what it was designed to measure.
- Research is reliable if it can be repeated with the same results.
- Quantitative research collects data that can be represented in numbers.

Information Gathered Through

- ▶ Surveys
- ▶ Questionnaires

Qualitative Research

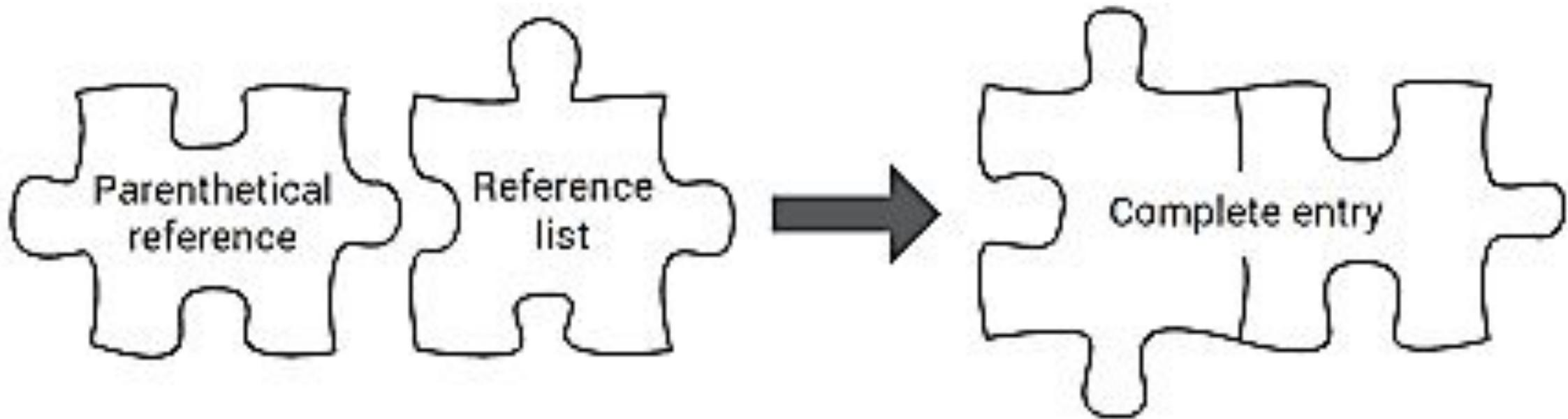
- Qualitative research is common in technical communication. Qualitative data cannot be represented in numbers. Instead, qualitative research analyzes words, images, processes, or objects.

Information Gathered Through

- ▶ Interviews
- ▶ Focus Groups
- ▶ Field Observations
- ▶ Document Analysis

Types of Questions	Examples				
Either/Or Questions	<p>Would you or your technical staff find it useful to receive a technical newsletter on acid rain?</p> <ul style="list-style-type: none"> a. Yes b. No 				
Multiple Choice Questions	<p>If you answered “yes” to preceding question, what publication schedule would best meet your needs:</p> <ul style="list-style-type: none"> a. Monthly b. Quarterly c. yearly 				
Grade-Scale Questions	<p>Acid Rain is an issue that has strong impact on your day-to-day business:</p> <table border="1" data-bbox="762 817 2042 1023"> <tr> <td>Strongly Agree</td> <td>Agree</td> <td>Disagree</td> <td>Strongly Disagree</td> </tr> </table>	Strongly Agree	Agree	Disagree	Strongly Disagree
Strongly Agree	Agree	Disagree	Strongly Disagree		
Short-Answer Questions	<p>List any environmental newsletters you already receive that you find helpful in business.</p>				

Documenting Sources



SUMMARY OR PARAPHRASE

- According to Jones (1998), APA style is a difficult citation format for first-time learners.
- APA style is a difficult citation format for first-time learners (Jones, 1998, p. 199).

SHORT QUOTATIONS

- According to Jones (1998), "students often had difficulty using APA style, especially when it was their first time" (p. 199).
- Jones (1998) found "students often had difficulty using APA style" (p. 199); what implications does this have for teachers?

Reference List

- Your reference list should appear at the end of your paper.
- It provides the information necessary for a reader to locate and retrieve any source you cite in the body of the paper.
- Each source you cite in the paper must appear in your reference list; likewise, each entry in the reference list must be cited in your text.

Book	<p>Author, A. A. (Year of publication). Title of work: Capital letter also for subtitle. Publisher Name. DOI (if available)</p> <p>Stoneman, R. (2008). Alexander the Great: A life in legend. Yale University Press.</p>
Journal Article	<p>Last name, F. M., & Last name, F. M. (Year). Title of article. Title of Periodical, Vol.(Issue), page numbers. DOI</p> <p>Drollinger, T., Comer, L. B., & Warrington, P. T. (2006). Development and validation of the active empathetic listening scale. <i>Psychology & Marketing</i>, 23(2), 161-180. https://doi.org/10.1002/mar.20105</p>
Essay or article in a book	<p>Armstrong, D. (2019). Malory and character. In M. G. Leitch & C. J. Rushton (Eds.), <i>A new companion to Malory</i> (pp. 144-163). D. S. Brewer.</p>
Online source	<p>Bernstein, Mark. "10 Tips on Writing the Living Web." <i>A List Apart: For People Who Make Websites</i>, 16 Aug. 2002, alistapart.com/article/writeliving. Accessed 4 May 2009.</p>

- **APA Formatting and Style Guide:**

[https://owl.purdue.edu/owl/research and citation/apa style/apa for
matting and style guide/general format.html](https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_formatting_and_style_guide/general_format.html)

PROPOSALS

CHAPTER: 12

Proposals can be categorized in several ways relating to the audience:

Proposal Category	Definition of Category
A. internal	within the organization
external	outside the organization
B. formal	contains parts used in formal reports
informal	omits elements of formal reports; is often briefer
C. solicited	is written in response to a request
unsolicited	is written independently without a request
D. sales	attempts to sell a product or service
research	seeks approval for a research study
grant	asks for funding for a project
planning	attempts to persuade the audience to take a certain action

	Internal Audience	External Audience
Unsolicited proposal	<p>Suggests changes within an organization.</p> <p>Often written as an informal, memo proposal.</p> <p>May be formatted as a formal document if the proposal is expensive or suggests a major change, or if the primary audience is at the highest decision-making level (such as a board of directors).</p>	<p>Recommends product or service to potential client.</p> <p>A rare form of proposal—may be written as an informal letter proposal or preproposal that offers to solve a problem and introduces the organization's qualifications.</p> <p>Usually followed by a formal, solicited proposal.</p>
Solicited proposal	<p>Suggests ways to solve problems or improve practices within an organization.</p> <p>Written at the request of another member of the organization.</p> <p>May be followed by a feasibility study.</p> <p>May be informal or formal in format, depending on complexity of the project and preferences of the reader.</p>	<p>Meets a specific need described by a client.</p> <p>Often a formal proposal written in response to a request for proposal (RFP).</p> <p>May be an informal letter proposal if it has been requested by a client as part of an ongoing business relationship.</p>

Grant proposal	<p>Requests support for special internal projects.</p> <p>Rare, although some organizations may make money available through a foundation or other special fund.</p> <p>Often written in informal, memo format.</p>	<p>Requests support to meet a community need.</p> <p>Formal document written in response to established guidelines or to a specific RFP.</p> <p>Addressed to nonprofit organizations, professional organizations, or government agencies.</p>
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In-house proposal for security protocol training:

James Oliver, Chief Financial Officer, has received the results of an internal audit that found problems in the way client information is being digitally secured. He asks Greg Bass, Director of Information Systems (IS), to propose changes that will improve IS security and training of all affected employees.

In-house proposal for change in purchasing practices:

Mack Boh, Facilities Maintenance Supervisor at the Baltimore branch office, writes a proposal to Brenda Seymour, Purchasing Director, suggesting that M-Global use environmentally friendly cleaning products whenever possible. The proposal describes a system for trials of products for effectiveness; each branch will use the system to develop its own list of approved products.

Sales proposal for dam removal project:	The Minnesota Department of Natural Resources issues a Request for Proposals for the removal of an earthen dam from a state park. The dam, built in the 1930s, is no longer safe, and it is to be removed as the first step in a river restoration project.
Grant proposal for new equipment design:	Oilarus, Ltd., a British oil company, sometimes gives research-and-development funds to small companies. Such funding usually goes toward development of new technology or products in the field of petroleum engineering. Angela Issam, who works in M-Global's Equipment Design Lab decides to apply for funding for a research project. Her proposed project, if successful, would provide a new piece of oil-drilling safety equipment that would reduce the chance of offshore oil spills at production sites.

ABC Format: Unsolicited Proposal

- **ABSTRACT:** Gives a summary or “big picture” for those who make decisions about your proposal.
 - The need—a problem to be solved or situation to be improved
 - Summary of the solution
 - **BODY:** Gives the details about exactly what you are proposing to do.
 - **CONCLUSION:** Drives home the main benefit and makes clear the next step.
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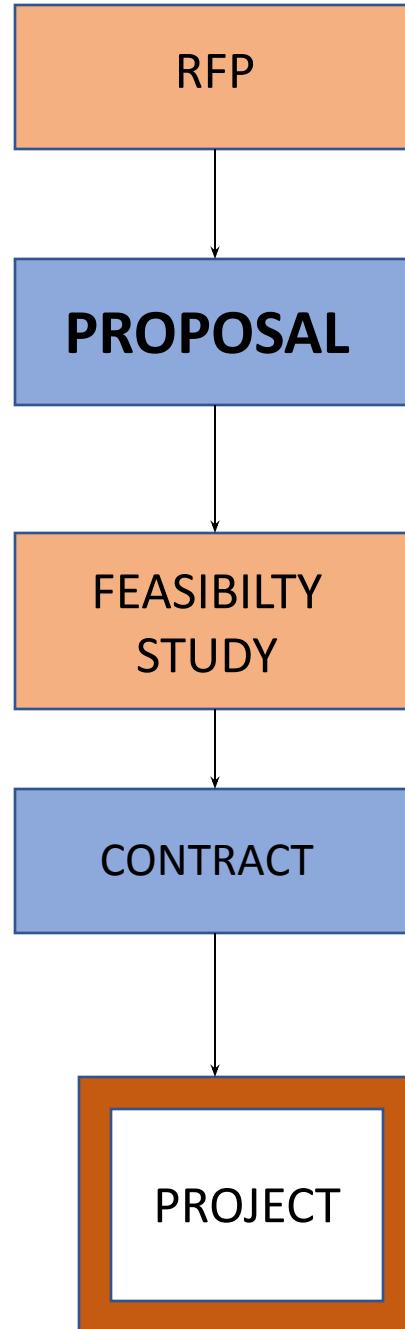
ABC Format: Solicited Proposal

- **ABSTRACT:** Overview of the scope and desired outcomes
 - Scope of the proposal
 - Restatement of the situation or problem
 - Summary of proposing organization's qualifications
 - Benefits of the proposal
 - Overview of the general organization of the proposal
- **BODY:** Details of the proposed plan, product, or service
 - Summary of the current situation
 - Background information and data as appropriate
 - Technical information
 - Management information
 - Cost information
 - (Appendixes—appear after text, but support body section)
- **CONCLUSION:**
 - Benefits of accepting the proposal
 - Unique qualifications of the proposing organization

Flowchart showing the main documents involved in one possible project

Feasibility studies are documents that show the practicality of a proposed policy, product, service.

RFP (request for proposals) are documents sometimes sent out by organizations that want to receive proposals for a product or service.



ABC Format: Grant Proposal

- **ABSTRACT:** Overview of the project
 - Statement of need
 - Mission of your organization
 - Explanation of how the proposed program will meet the goals of the granting organization
- **BODY:** Details of the proposal
 - Background information about your organization
 - Detailed explanation of the situation, including data and other supporting research
 - Objectives to be used to evaluate the success of the proposed program
 - Importance of proposal to the community
 - How results will be shared (for research grants)
 - Budget
- **CONCLUSION:** Importance of the project
 - Summary of community needs to be met
 - How community needs fit the granting organization goals
 - Main reason why your organization is best suited to meet the community need