SHORT, INFORMAL REPORTS

REPORTS AND MEMOS/LETTERS. WHAT IS THE DIFFERENCE?

Reports come in all shapes and sizes

Banks (Job in Jeopardy, Adverse action letter)

Accountants (Financial statements, Valuation reports)

Software developers (Flash notification, Release notes)

WHAT IS A REPORT?

Any documentation for a specific audience and purpose

It can be conveyed using different communication channels

REPORTS ARE WRITTEN FOR?

- Supply a record of work accomplished
- Record and clarify complex information for future
- Present information for multiple audience
- Record problems faced
- Recommend future action
- Document schedules, timetables milestones and current status
- Record procedures

TABLE ASPECTS OF REPORTS

Report Features	Distinctions	Definition of Unique Characteristics
Length and Scope	Short	A typical short report is limited to one to five pages. Short reports focus on topics with limited scope. This could include a limited timeframe covered in the report, limited financial impact, limited personnel, and limited impact on the company.
	Long	Long reports are more than five pages. If a topic's scope is large, including a long timeframe, significant amounts of money, research, many employees, and a momentous impact on the company, a long report might be needed.
Formality (tone)	Informal	Most short reports are informal, routine messages, written as letters, memos, or e-mail.
	Formal	Formal reports are usually long and contain standardized components, such as a title page, table of contents, list of illustrations, abstract, appendices, and works cited/references.
Audience	Internal (high tech or low tech)	Colleagues, supervisors, or subordinates within your company are an internal audience. Usually you would write an e-mail or memo report.
	External (multiple audience levels)	An external audience is composed of vendors, clients, customers, or companies with whom you are working. Usually you would write a report in letter format.
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Purpose	Informational	Informational reports focus on factual data. They are often limited in scope to findings: "Here's what happened."
	Analytical	Analytical reports provide information, but analyze the causes behind occurrences. Then, these analytical reports draw conclusions, based on an interpretation of the data: "Here's what happened and why this occurred."
	Persuasive	Persuasive reports convey information and draw conclusions. Then, these reports use persuasion to justify recommended follow-up action: "Here's what happened, why this occurred, and what we should do next."
Communication Channels	E-mail	E-mail reports, written to internal and external audiences, are short and informal.
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	Letter	Letter reports are sent to external audiences. These reports can be long or short, formal or informal, depending on the topic, scope, purpose, and audience.
	Electronic (online)	Many reports can be accessed via a company's Web site. These reports can be downloaded and printed out and often are "boilerplate"—text that can be used repetitively. Electronic reports also provide interactivity, allowing end-users to fill out the report online and submit it to the intended audience.

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TYPES OF REPORTS

Incident reports	Investigative reports	Trip reports
Lab or Test reports	Progress Reports	Feasibility/Recommendation reports

CRITERIA FOR WRITING REPORTS

1.

ORGANIZATION

Five basic features

ORGANIZATION

Identification Lines

Headings and Talking Headings

Introduction

Discussion

Conclusion/recommendations

IDENTIFICATION LINES

Date

Name of person(s) addressed

Name of recipient(s)

Subject of report

Topic + Focus

EXAMPLE

Date: March 15, 2014
To: Rob Harken
From: Stacy Helgoe
Subject: Report on Usenet Conference

HEADINGS AND TALKING HEADINGS

Improves layout
Making content accessible
Headings help divide content into sections
Talking headings help reader finding specific information

INTRODUCTION

Overview of the report
Three or more optional subdivisions

Purpose

Personnel

Dates

INTRODUCTION

Purpose

Personnel

Dates

Topic sentence or paragraph
Why (rationale, justification, objectives)
Subject matter

INTRODUCTION

Purpose

Personnel

Names of others involved in the reporting activity

Dates

INTRODUCTION

Purpose

Personnel

Dates

What period of time the report covers

Introduction

Report Objectives: I attended the Southwest Regional Conference on Workplace Communication in Fort Worth, TX, to learn more about how our company can communicate effectively. This report addresses the workshops I attended, consultants I met with, and pricing for training seminars.

Conference Dates: August 5–8, 2014

Committee Members: Susan Lisk and Larry Rochelle

WHY IS INTRODUCTION NECESSARY

Readers do NOT always know why the report is written, when the activities occurred and who was involved

UNANTICIPATED READERS

Immediate supervisors change

Immediate supervisors aren't always available

SUBJECT MATTER: CONCERNS

Written not only for present but also the future

You and/or reader might not remember:

Particulars of the matter

You won't be familiar with the subject

External, lay readers

DISCUSSION

Summarizes many topics

- Activities
- Problems you encountered
- Costs of equipment
- Warranty information
- More

DISCUSSION

Summarizes many topics

How its developed varies with the type of report drafted

- Activities
- Problems you encountered
- Costs of equipment
- Warranty information
- More

CONCLUSION/RECOMMENDATIONS

Summarize

Relating or connecting findings (Outcomes)

State what decisions you have made

Recommendations (future course of action)

Conclusion/Recommendation

Benefits of the Conference

The conference was beneficial. Not only did it teach me how to improve my technical communication but also it provided me contacts for technical communication training consultants.

Proposed Next Course of Action

To ensure that all employees benefit from the knowledge I acquired, I recommend hiring a consultant to provide technical communication training.
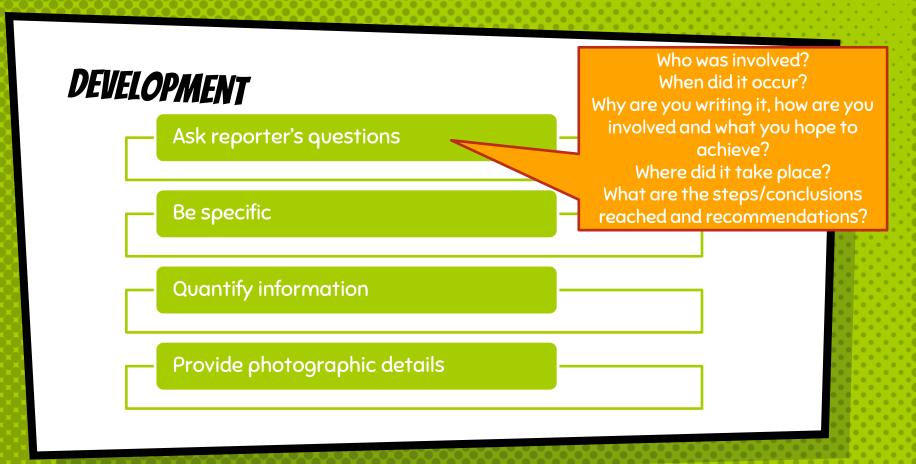
DEVELOPMENT
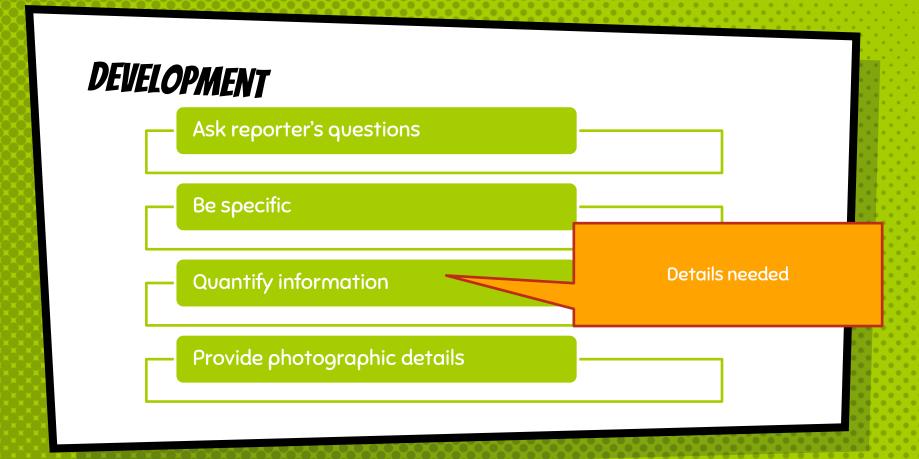
Ask reporter's questions

Be specific

Quantify information

Provide photographic details

DEVELOPMENT

Ask reporter's questions

Be specific

Quantify information

Provide photographic details

Who was involved?
When did it occur?
Why are you writing it, how are you involved and what you hope to achieve?
Where did it take place?
What are the steps/conclusions reached and recommendations?

DEVELOPMENT

Ask reporter's questions

Be specific

Quantify information

Details needed

Provide photographic details

BEFORE

Installation of the machinery is needed to replace a piece of equipment deemed unsatisfactory by an Equipment Engineering review.

AFTER

The *exposure table* needs to be installed by *9/10/14* so that we can *manufacture printed wiring products with fine line paths and spacing (down to 0.0005 inch)*. The table will replace the *outdated printer* in Department 76. Failure to install the table *will slow the production schedule by 27 percent*.

AUDIENCE

Who is your audience?
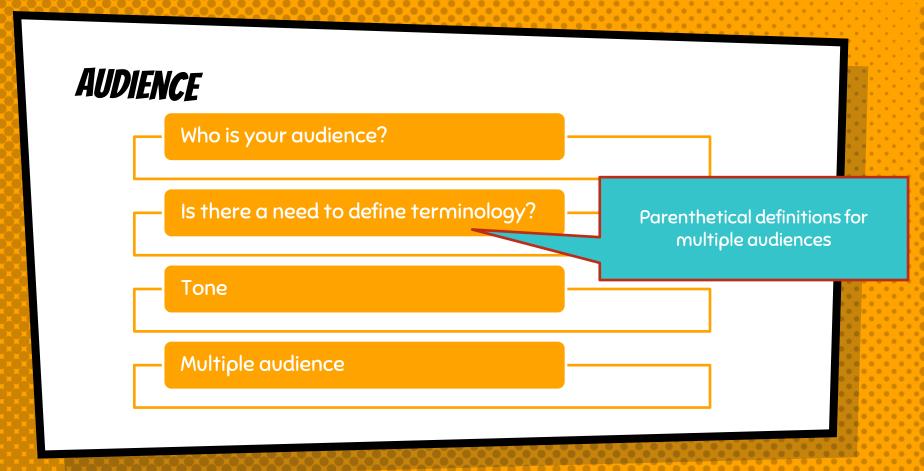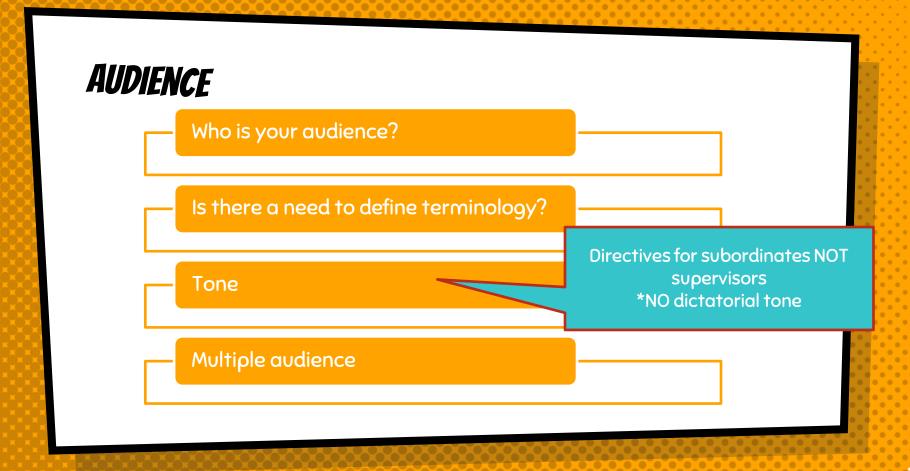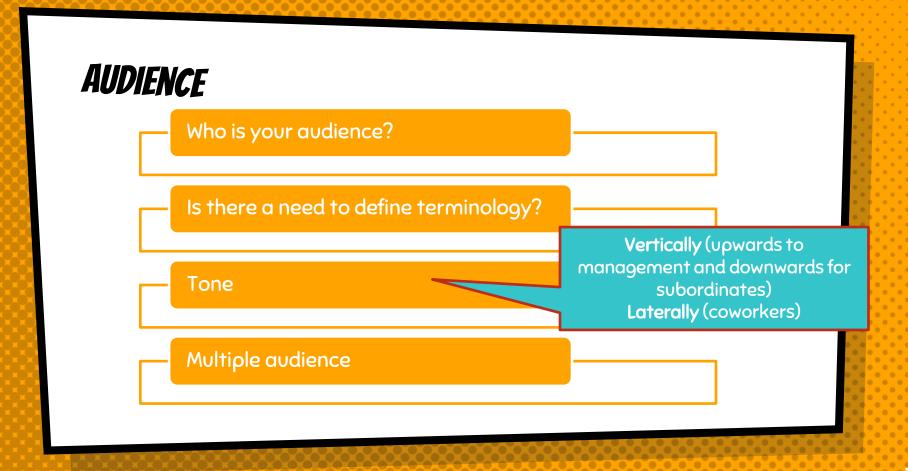
Is there a need to define terminology?

Tone

Multiple audience

AUDIENCE

Who is your audience?

Is there a need to define terminology?

Parenthetical definitions for multiple audiences

Tone

Multiple audience

AUDIENCE

Who is your audience?

Is there a need to define terminology?

Tone

Directives for subordinates NOT supervisors
*NO dictatorial tone

Multiple audience

AUDIENCE

Who is your audience?

Is there a need to define terminology?

Tone

Vertically (upwards to management and downwards for subordinates)
Laterally (coworkers)

Multiple audience

STYLE

Eliminate wordy phrases

Headings, subheadings and graphics can be used

BEFORE

Johnson County is expected to add 157,605 persons to its 1990 population of 270,269 by the year 2015. That population jump would be accompanied by a near doubling of the 96,925 households the county had in 1990. The addition of 131,026 jobs also is forecast for Johnson County by 2015, more than doubling its employment opportunity.

AFTER

Table 1 Johnson County Predicted Growth by 2015

	Population	Households	Employment
1990	270,269	96,925	127,836
2015	427,874	192,123	258,862
% change	+58.3%	+98.2%	+102%

TYPES OF SHORT, INFORMAL REPORTS

Incident reports	Investigative reports	Trip reports
Lab or Test reports	Progress Reports	Feasibility/Recommendation reports

INCIDENT REPORT

Automobile accident	Equipment malfunction	Fire
Robbery	Injury	Employee behavior

INCIDENT REPORT: POSSIBLE SCENARIOS

Biomedical technology

CAT scan in radiology not functioning leading to unreadable X-rays
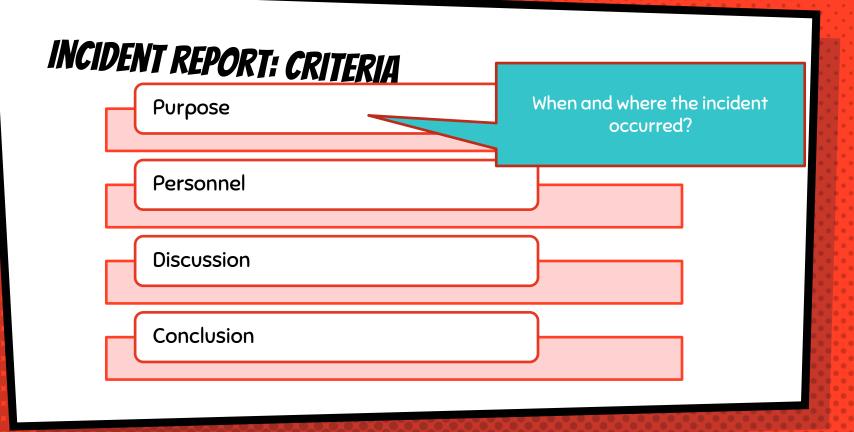
Hospitality management

Oven in a restaurant caught fire. Injured cook and damaged oven which needs to be replaced with fire resistant equipment

Retail
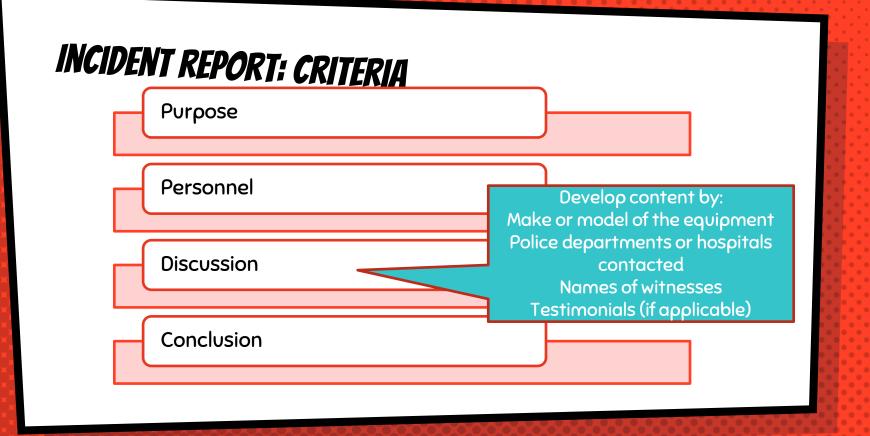
One site location has experienced burglary. As a site manager, you believe you can improve in-store security.

INCIDENT REPORT: CRITERIA

Purpose

Personnel

Discussion

Conclusion

INCIDENT REPORT: CRITERIA

- Purpose
- Personnel
- Discussion
- Conclusion

Who was involved
What role do you play in the incident (actions)?
Why are you involved in the activity (rank/position)?

INCIDENT REPORT: CRITERIA

Purpose

Personnel

Discussion

Body
Findings
Agenda
Work accomplished
Subheadings,
Itemization, Quantify

Conclusion

INCIDENT REPORT: CRITERIA

Purpose

Personnel

Discussion

Conclusion

Develop content by:
Make or model of the equipment
Police departments or hospitals contacted
Names of witnesses
Testimonials (if applicable)

INCIDENT REPORT: CRITERIA

Purpose

Personnel

Discussion

Conclusion

Develop content by:
Extent of damage – financial and physical
Graphics (sketches, schematics, diagrams, layouts, etc.) depicting the incident visually
Follow-up action taken to solve the problem

INCIDENT REPORT: CRITERIA

Purpose

Personnel

Discussion

Conclusion

Explain what caused the problem
Relate what could be done in the future to avoid similar problems

FIGURE 1 E-mail Incident Report

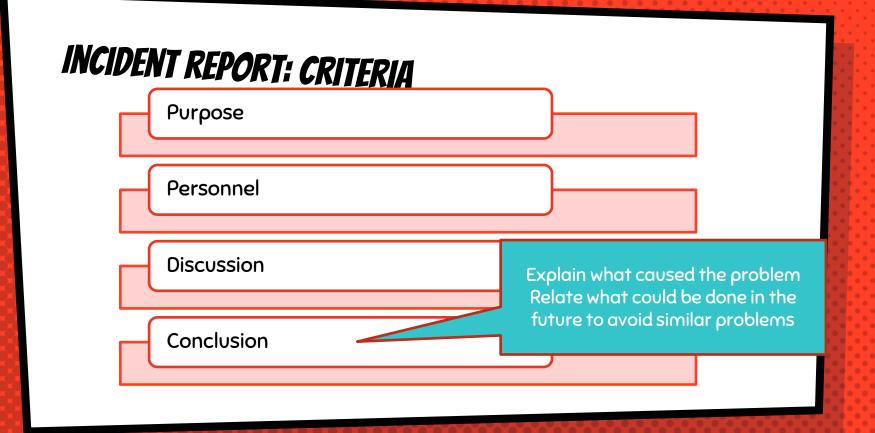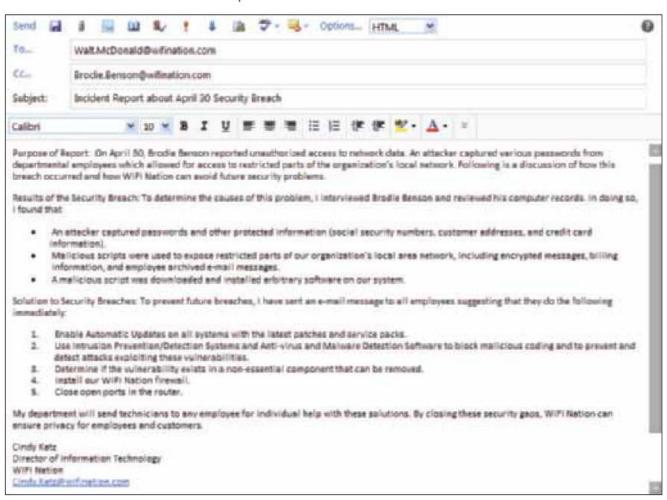|	
Send	HTML
To...	Walt.McDonald@wifination.com
CC...	Brodie.Benson@wifination.com
Subject:	Incident Report about April 30 Security Breach

Calibri 10 B I U

Purpose of Report: On April 30, Brodie Benson reported unauthorized access to network data. An attacker captured various passwords from departmental employees which allowed for access to restricted parts of the organization's local network. Following is a discussion of how this breach occurred and how WiFi Nation can avoid future security problems.

Results of the Security Breach: To determine the causes of this problem, I interviewed Brodie Benson and reviewed his computer records. In doing so, I found that:

- An attacker captured passwords and other protected information (social security numbers, customer addresses, and credit card information).
- Malicious scripts were used to expose restricted parts of our organization's local area network, including encrypted messages, billing information, and employee archived e-mail messages.
- A malicious script was downloaded and installed arbitrary software on our system.

Solution to Security Breaches: To prevent future breaches, I have sent an e-mail message to all employees suggesting that they do the following immediately:

1. Enable Automatic Updates on all systems with the latest patches and service packs.
2. Use Intrusion Prevention/Detection Systems and Anti-virus and Malware Detection Software to block malicious coding and to prevent and detect attacks exploiting these vulnerabilities.
3. Determine if the vulnerability exists in a non-essential component that can be removed.
4. Install our WiFi Nation firewall.
5. Close open ports in the router.

My department will send technicians to any employee for individual help with these solutions. By closing these security gaps, WiFi Nation can ensure privacy for employees and customers.

Cindy Katz
Director of Information Technology
WiFi Nation
Cindy.Katz@wifination.com

The writer relies on a "problem/solution" analytical pattern of organization for this short, informal, internal e-mail report.

The writer includes a "signature file" that acts like an online business card, clearly identifying the writer and providing contact information.

INVESTIGATIVE REPORT

It focus on what happened and why it happened

Investigative reports are drafted for specific instances

INVESTIGATIVE REPORT

Security

One of your customers lost her purse at a party after which her debit card is used. Working in a bank's security department, your job is to investigate and present your findings

Engineering

A historic bridge is now buckling, making left lane higher than right lane. Specific adjustments are needed. You need to visit site and report on causes for the flaw.
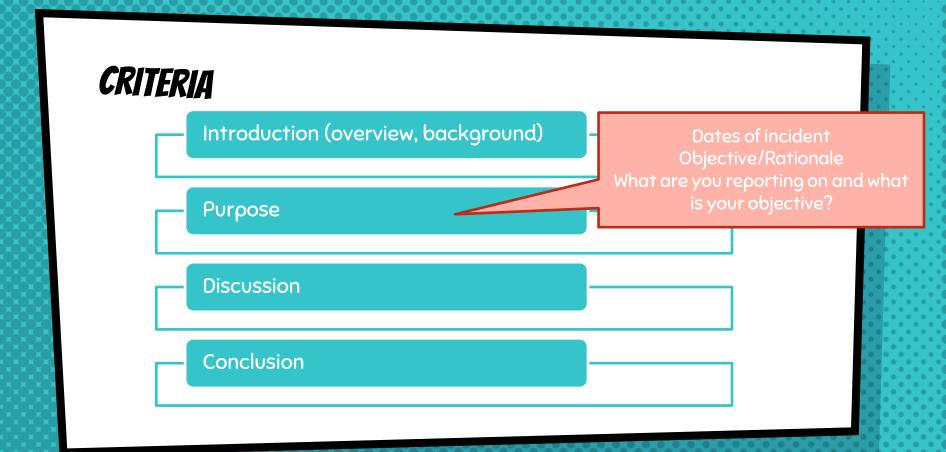
Computer Technology

Working in technology department, your college requires the students grades and work is updated on database. Students' records on input grades and you have to investigate the cause and solve issues.
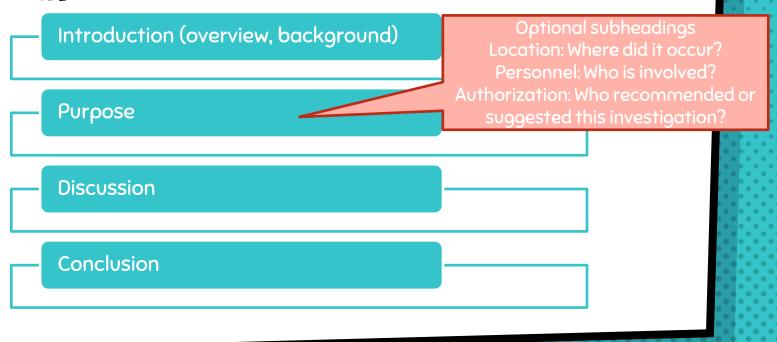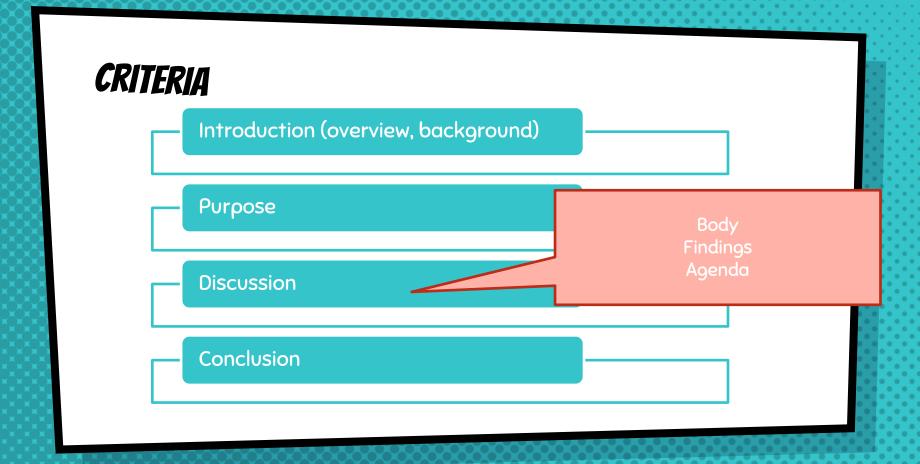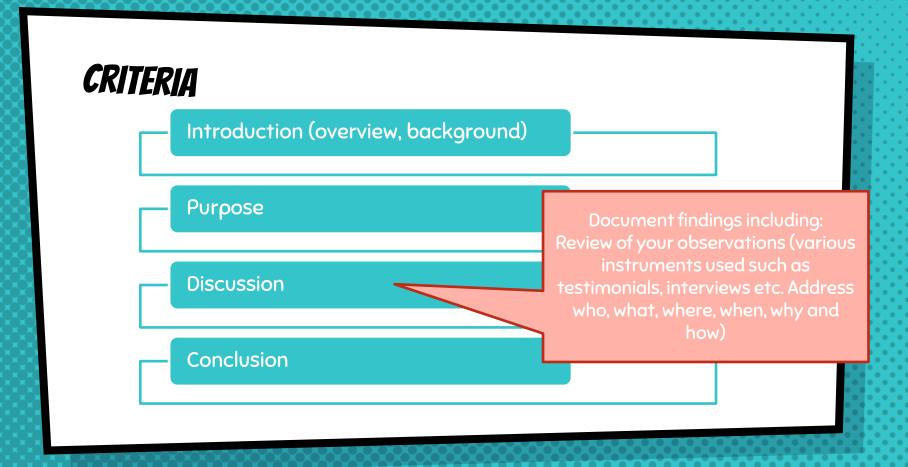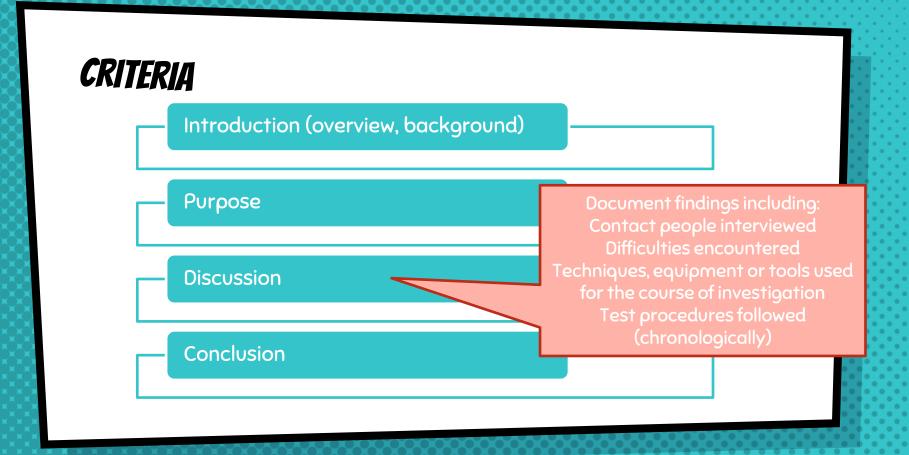
CRITERIA

Introduction (overview, background)

Purpose

Discussion

Conclusion

CRITERIA

Introduction (overview, background)

Purpose

Discussion

Conclusion

Dates of incident
Objective/Rationale
What are you reporting on and what is your objective?

CRITERIA

Introduction (overview, background)

Purpose

Optional subheadings
Location: Where did it occur?
Personnel: Who is involved?
Authorization: Who recommended or suggested this investigation?

Discussion

Conclusion

CRITERIA

Introduction (overview, background)

Purpose

Discussion

Body
Findings
Agenda

Conclusion

CRITERIA

Introduction (overview, background)

Purpose

Discussion

Conclusion

Document findings including: Review of your observations (various instruments used such as testimonials, interviews etc. Address who, what, where, when, why and how)

CRITERIA

Introduction (overview, background)

Purpose

Discussion

Conclusion

Document findings including:
Contact people interviewed
Difficulties encountered
Techniques, equipment or tools used
for the course of investigation
Test procedures followed
(chronologically)

CRITERIA

Introduction (overview, background)

Purpose

Discussion

Conclusion

Conclude providing summarized findings
Who is at fault?
Recommend future course of action (changing personnel or approach, technologies, follow-up for affected, how to resolve problem)

Frog Creek Wastewater Treatment Plant
9276 Waveland Blvd.
Bowstring City, UT 86554

September 22, 2014

Bowstring City Council
Arrowhead School District 234
Bowstring City, UT 86721

Subject: Investigative Report on Frog Creek Wastewater Pollution

On September 12, 2014, teachers at Arrowhead Elementary School reported that over a five-day period (September 8–12), approximately 20 students complained of nausea, lightheadedness, and skin rashes. On the fifth day, the Arrowhead administration called 911 and the Arrowhead School District (ASD 234) in response to this incident.

Bowstring City paramedics treated the children's illnesses, suggesting that the problems might be due to airborne pollutants. The Bowstring City Council contacted the Frog Creek Wastewater Treatment Plant (FCWTP) to investigate the causes of this problem. This report is submitted by Mike Moore (Director of Public Relations), Sue Cottrell (Wastewater Engineer), and Thomas Redburn (Wastewater Engineer), in response to Bowstring City's request.

Committee Findings

Impact on Schoolchildren: Arrowhead Elementary School administrators reported the following:

- Monday, September 8—Two children reported experiencing nausea.
- Tuesday, September 9—Two children reported experiencing nausea, and one child experienced lightheadedness.
- Wednesday, September 10—Three children experienced skin rashes.
- Thursday, September 11—Two children complained of nausea, one child was lightheaded, and two children showed evidence of skin rashes.
- Friday, September 12—Two children reported nausea, three reported skin rashes, and two lightheadedness.

After Friday's occurrences, Arrowhead Elementary School administrators called 911. Bowstring paramedics reported that (with parental approval) the children were treated with antacids for nausea, antihistamines for skin rashes, and oxygen for their lightheadedness. No other incidents were reported in the neighborhood surrounding the school.

Report on Frog Creek Pollutants: Wastewater Engineers Sue Cottrell and Thomas Redburn took samples of Frog Creek on September 12–15 and found the following:

Typical Frog Creek Readings	Readings from September 12–15
Low alkalinity: (generally <30 mg/l) (milligrams per liter)	High alkalinity readings: <45 mg/l
Low inorganic fertilizer nutrients (phosphorous and nitrogen): <20 mg/l	High phosphorous and nitrogen readings: <25 mg/l
Limited algae growth: 1 picometers	High algae readings: 4 picometers

Explanation of Findings:
Despite normally low readings, in late summer, with heat and rain, these readings can escalate. Higher algae-related odors above the 3 to 6 picometer thresholds, along with increased alkalinity (<50 mg/l) can create health problems for youth, elderly, or anyone with respiratory illnesses.

These studies showed that algae, alkalinity, and fertilizer nutrients were higher than usual.

The above elevated readings were caused by three factors (heat, rain, and northeasterly winds).

- Heat—On the days of the Arrowhead Elementary School incident, the temperature ranges were 92 to 95 degrees F, unusually high for early September. Algae and chemical growth increases in temperatures above 84 degrees F.

- Rain—In addition, on September 8–10, Bowstring City received 2 inches of rain, swelling Frog Creek to 3 feet above its normal levels. Studies show that rain-swollen creeks and rivers lead to increased pollutants, as creek bottom silt rises.
- Wind—On September 8–9, a prevailing northeasterly wind blew from Frog Creek toward Arrowhead Elementary School's playground.

Follow-up Studies: On September 16–19, our engineers rechecked Frog Creek, finding that the chemical levels had returned to a normal, acceptable range.

Conclusion about Incident

Frog Creek normally has acceptable levels of algae, alkalinity, and fertilizer nutrient levels. The heat and higher water levels temporarily led to elevated pollutant readings. These levels subsequently returned to normal. Wind directions during the school incidents also had an impact on the children's illnesses. On follow-up questionnaires, FCWTP employees found that the school children's ailments had subsided.

The Arrowhead Elementary School situation appears to have been an isolated incident due to atmospheric changes.

Recommendations for Future Course of Action

Though we constantly monitor Frog Creek for safety, FCWTP HAZMAT employees would be happy to work with parents and teachers to provide additional health information. In a one-hour workshop, presented during the school day or at a Parent-Teacher Organization meeting, FCWTP could offer the following information:

- Scientific data about stream and creek pollutants
- The effects of rain, wind, and heat on creek chemicals
- Useful preventive medical emergency techniques

This information would explain real-world applications for science classes and provide valuable health tips for parents and teachers. We have enclosed for your review information about our proposed training sessions.

Please let us know if you would like to benefit from this free-to-the-public workshop. We would be happy to schedule one at your convenience.

Mike Moore

Mike Moore
Frog Creek Wastewater Treatment Plant Director of Public Relations

Enclosure

Frog Creek Wastewater Treatment Plant

"Safety is Our Number 1 Concern."
9276 Waveland Blvd.
Bowstring City, UT 86554

September 22, 2014

Attention: Parents and Arrowhead Elementary School Teachers and Administrators

Subject: Report on September 8–12 Frog Creek Incident

Recently, your children at Arrowhead Elementary School experienced nausea, lightheadedness, and skin rashes. This was due to an unusual environmental situation at Frog Creek, a rare case of airborne pollutants caused by high winds and rain.

How Did This Happen?

Algae is a good thing. The crayfish, snails, and minnows that your children love seeing in Frog Creek thrive on algae and lichen (the small, green plants that are the food base for most marine life). However, when temperatures rise above 84 degrees, algae can grow to an unhealthy level.

The same thing applies to the acid level in water. When acid is regulated by alkalinity, algae growth is controlled. When acid levels rise, however, algae can bloom or marine creatures can die. Both of these problems lead to unusual odors.

That's what happened last week. Our studies showed that algae and alkalinity were higher than usual. The causes were increased heat, rain, and wind:

- Heat—On the days of the Arrowhead Elementary School incident, the temperature ranges were 92 to 95 degrees F, unusually high for early September.
- Rain—In addition, on September 8–10, Bowstring City received 2 inches of rain, swelling Frog Creek to 3 feet above its normal levels. The rain forced the creek bottom silt to rise, which led to increased pollutants.
- Wind—On September 8–9, a northeasterly wind blew from Frog Creek toward Arrowhead Elementary School's playground.

What Can We Do to Help?

Could heat, rain, and wind lead to similar situations in the future? Yes. But . . . the incidents from last week were very rare. Please do not expect a repeat occurrence any time soon. Tell your children to enjoy Frog Creek for its beauty and natural resources.

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September 22, 2014

We would be happy to meet with you and your children to explain the science of this environmental event. Plus, we'd like to provide techniques for managing simple ailments like nausea, skin rashes, and lightheadedness.

In a one-hour workshop, presented during the school day or at a Parent-Teacher Organization meeting, Frog Creek Wastewater Treatment Plant (FCWTP) could offer the following information:

- Scientific data about stream and creek pollutants—with hands-on tutorials for your students.
- The effects of rain, wind, and heat on creek chemicals—complete with graphics and an age-appropriate PowerPoint presentation.
- Useful preventive medical emergency techniques—which every parent and child should know.

This information would explain real-world applications for science classes, as well as provide valuable health tips for parents and teachers. We have enclosed for your review information about our proposed training sessions.

Please let us know if you would like to benefit from this free-to-the-public workshop. We would be happy to schedule one at your convenience. FCWTP wants to assure you that your child's "safety is our number 1 concern."

Mike Moore

Mike Moore
Frog Creek Wastewater Treatment Plant Director of Public Relations

Enclosure

ANY QUESTIONS?

Activity:

Have a look at the report attached and find the issues