



Matrusri Engineering College
(An Autonomous Institution)



(Approved by AICTE & Affiliated to Osmania University & NBA Accredited)

Common to All Branches

Subject : Effective Technical Communication in English **Name of the Faculty:** Mrs.Dr.B.Chandana

UNIT 4

REPORT WRITING

Formal business reports have important functions in helping managers and executives make decisions. These documents can have a variety of purposes depending on your needs and industry. Learning how to write a formal business report can help you develop as a professional. In this article, we explain what a formal business report is, how to write one and provide an example.

What is a formal business report?

A formal business is an official document that contains data, research, information and other necessary details to help decision makers form plans and objectives to help the company. Depending on the topic, a formal business report could be several pages long and include extensive data and information. Here are a few of the most common types of formal business reports, designated by purpose:

- **Justification/Recommendation report:** You can use this report to propose an idea to management. The body would include sections like risks, costs and benefits. An example of this type of report would be to propose buying a machine for your workplace. To convince the decision maker to buy the machine, you would create this report to make a convincing argument.
- **Investigative report:** This report can present the potential risks of a specific opportunity. This report is helpful for business owners to anticipate any issues involved in making an investment or purchase. You could also create a formal business report to analyze a proposed merger.
- **Compliance report:** Use this report when the organization wants to show accountability and create a compliance report. It is a report that allows an organization to prove that it is following regulations and that it is spending money properly. For example, an accountant could write a compliance report to show the company followed federal laws regarding spending.

- **Feasibility report:** When you need to analyze the outcomes of a proposed idea, you can use this report. The report could cover potential problems, associated costs and the benefits of the idea. With this report, you can determine if the proposal will be profitable, if the deadline is feasible and if there's a chance it could exceed the budget.
- **Research studies report:** This report helps you analyze a problem. The report would include recommendations to resolve the problems.
- **A periodic report:** This report helps an organization improve its products, services, processes or policies. The report can include things like profit and loss information or it may examine efficiency. For instance, a retail store would have a monthly report on its sales.
- **A situational report:** To discuss a specific topic, such as information from a conference, use a situational report.
- **A yardstick report:** You can use this report to present several solutions as options to a particular situation.

Parts of a Report

Title page

This should include the title of the report (which should give a precise indication of the subject matter), the author's name, module, course and the date.

Acknowledgements

You should acknowledge any help you have received in collecting the information for the report. This may be from librarians, technicians or computer centre staff, for example.

Contents

You should list all the main sections of the report in sequence with the page numbers they begin on. If there are charts, diagrams or tables included in your report, these should be listed separately under a title such as 'List of Illustrations' together with the page numbers on which they appear.

Abstract or summary

This should be a short paragraph summarizing the main contents of the report. It should include a short statement of the main task. The abstract or summary should be concise, informative and independent of the report.

Write this section **after** you have written the report.

Results or findings

Present your findings in as simple a way as possible. The more complicated the information looks, the more difficult it will be to interpret. There are a number of ways in which results can be presented. Here are a few :

- Tables
- Graphs
- Pie charts
- Bar charts
- Diagrams

Illustration checklist

- Are all your diagrams / illustrations clearly labeled?
- Do they all have titles?
- Is the link between the text and the diagram clear?
- Are the headings precise?
- Are the axes of graphs clearly labeled?
- Can tables be easily interpreted?
- Have you abided by any copyright laws when including illustrations/tables from published documents?

Discussion

This is the section where you can analyse and interpret your results drawing from the information which you have collected, explaining its significance. Identify important issues and suggest explanations for your findings. Outline any problems encountered and try and present a balanced view.

Conclusion and recommendations

This is the section of the report which draws together the main issues. It should be expressed clearly and should not present any new information. You may wish to list your recommendations in separate section or include them with the conclusion.

References

It is important that you give precise details of all the work by other authors which has been referred to within the report. Details should include :

- author's name and initials
- date of publication
- title of the book, paper or journal
- publisher
- place of publication
- page numbers
- details of the journal volume in which the article has appeared.

References should be listed in alphabetical order of the authors' names.

Make sure that your references are accurate and comprehensive.

Appendices

An appendix contains additional information related to the report but which is not essential to the main findings. This can be consulted if the reader wishes but the report should not depend on this. You could include details of interview questions, statistical data, a glossary of terms, or other information which may be useful for the reader.

How to write a formal business report

The following is a step-by-step guide to creating a professional business report:

1. Plan before you write.
2. Check for an in-house format.
3. Add a title.
4. Write a table of contents.
5. Create a summary or abstract.
6. Include an introduction.
7. Outline your methodology.
8. Present your findings.
9. Finish with a conclusion and recommendations.
10. Add a bibliography and appendices.
11. Proofread.

1. Plan before you write

Treat the formal business report as you would handle a project. Before you start compiling research and writing down sections, plan exactly what you want to achieve. In doing so, you will have a better chance of creating a report in a clear and simple style.

2. Check for an in-house format

The company you work for may already have an established format for formal business reports. Check your company handbook or ask the person who wants the report to see if there's a specific format you should use. Using an established format will help your report look more professional.

3. Add a title

You might get the title of the report with the brief or you may write it yourself. Make sure the title is clear and visible at the beginning of the report. You should also add your name and the names of others who have worked on the report and the date you wrote it.

4. Write a table of contents

The table of contents page should follow the title and authors. The table of contents page is essential for a formal report that is long and complex. Although this page comes at the start of the report, it should be written last when the report is finished. Write down the section headings exactly as they appear in each section of the report and make sure the page numbers match too.

5. Add a summary or abstract

The summary summarizes the main points of a formal business report. It can be beneficial for the reader to have this section, but it is not mandatory, especially if your report is short. It is best to ask the person who has requested the business report if they prefer a summary or abstract. Although the summary comes at the beginning of the report, you should write it last, along with the contents page, so that you can include notes from your conclusion and recommendations section.

The summary should tell the reader about your findings and even draw on points from your conclusion. A brief overview of what the reader will find in the report is also important. Your manager may only have time to read the summary of the report, so it must describe the major points found in the report.

6. Write an introduction

This section will detail the reason why you are writing the report. The introduction should address the purpose of the report and background information on the subject you are writing about. Include any definitions and summarize the main argument.

7. Outline your methodology

The methodology section should explain to the reader the research methods you have chosen to create this report, such as using a qualitative method, a quantitative method or a combination of both. It should be a clear justification of why you chose to use certain methods.

8. Present your findings

This section is where you should present the outcome of your research. It is important to present your results logically and succinctly while making sure that you have included enough information to prove that you have researched the matter thoroughly.

One way of making the findings easier to read is by using headings, subheadings and numbered sections to organize everything. You can choose to present your findings in bullet points or with the help of a table. You might also choose to present your findings with illustrations and graphics—such as infographics—but be sure that these graphics are appropriate for the report.

9. Finish with a conclusion and recommendations

In this section, you would present your assessment from the findings, then make recommendations for action. If you add any goals, you should add measurable actions to them. Each goal, method or option suggested should tell the reader how it will affect the organization.

10. Add a bibliography and appendices

Include all of the sources you have used to write the report. These can include periodicals, online articles or books. List the sources in alphabetical order. You can also include all of the material to support the report. These may include questionnaires, maps, notes, summaries, charts, tables, illustrations and others. Label each note, map and other documents with a letter so that you can reference them clearly in the report.

12. Proofread

Once you're finished writing your report, proofread it to make sure it's free of any grammatical or spelling errors, which will make your report more credible. Moreover, be clear and concise when writing. Avoid complex words and slang. It is acceptable to use jargon and technical terms appropriate to the industry you are in, but avoid overusing them. Make sure that the writing flows from one section to another, especially if there was more than one author on the report.

Formal business report example

Here's a sample formal business report that you can review as a guide:

Report on Staff Turnover in GHS Corporation

Submitted August 08, 2019

Introduction

The human resources manager requested this report to examine the high turnover rate of employees at GHS Corporation. The information in this report was gathered by members of the human resources department over three months. The five-member team analyzed administration records and working conditions, as well as interviewed staff. In this report, recommendations are made to minimize the high turnover rate among the staff working at GHS Corporation

Background

GHS Corporation has been operating for 10 years. It employs 200 people, with most of the employees tasked with processing fees for insurance clients. Despite operating in a region with substantial unemployment, the annual turnover has been between 60 to 65% every year.

Findings

The most significant issue found by the HR team when interviewing staff was the lack of support to new mothers who require child care services to be able to come to work. Employees mentioned their frustration at not having an in-house child care system that could help them continue working.

Another issue mentioned by the staff was the lack of communication between employees and upper management. They expressed their concerns about receiving inconsistent and late instructions. They shared how they didn't know the main business objectives which led them to lose interest in the company and their jobs.

Conclusions

The main issues that we found were as follows:

1. Lack of support to new mothers in regards to childcare
2. Lack of communication between the staff and upper management

Recommendations

To address these two main issues, we recommend the following steps be taken:

1. An in-house childcare center can be established at minimal cost to GHS, encouraging mothers to return to work.
2. Each department should choose an employee ambassador to represent the interests of staff in management meetings. This ambassador can express concerns and relay outcomes to their teams to increase engagement.

Q1. MMD School, Nashik, recently organised a science symposium on the topic: 'Effect of pollution on quality of life'. You are Amit/Amita Raazdan, editor of the school magazine. Write a report on the event for your school magazine. (120 – 150 words)

(SOURCE- CBSE 2018)

Answer:

Report on Science Symposium held at MMD School, Nashik

-By Amit/ Amita Raazdan, Editor of the school magazine

A symposium was organised on 1 March 2018 in the school on the topic "Effect of Pollution on Quality of Life". All the science students were a part of the elucidative programme.

The event started with the felicitation of the guest speakers. Thereafter, the

participants were espoused by Sh. Suraj Prakash. He acquainted them with the objectives and goals of the workshop. The resource person Dr. Hari Om Gupta reflected his profound knowledge on the topic and highlighted how important it is to curb the menace of pollution.

An exalting demonstration of effects of pollution on our lives galvanized the engrossed participants. After the lunch break Dr. K.K. Arora, Resource Person, exhibited the possible steps that can be undertaken at the personal level to reduce pollution. It was followed by another session on the basic concept behind pollution reduction which triggered the young minds into thinking innovative ways.

An interactive concourse ignited the inquisitiveness of participants. They have committed themselves completely to bring about a change in the situation. The informative workshop culminated with a vote of thanks proposed by the head of the science department.

Q2. You are Karan/ Kirti of L.M. Memorial Public School, Dwarka. Your school has adopted a village as a social responsibility. Students are being taken to teach the children of that village on a regular basis. Write a report, for your school magazine, on the various other programmes organized there in 150-200 words.

(SOURCE- CBSE Sample Question Paper 2018-19)

Answer:

VILLAGE ADOPTION- A STEP TOWARDS BEING SOCIALLY RESPONSIBLE

-BY KARAN/ KRITI

On the occasion of World Literacy Day, L.M. Memorial Public School, Dwarka has taken an oath to embrace the village named Rajpur.

The school has taken the responsibility of educating the people residing in the village. Selected students from each standard are taken there every weekend, during school hours to impart knowledge. The first 6 month motive is to make each and every person capable of reading and writing. Free books and stationery is being provided for quality education. Children are given time to spend with each

other, play games and interact. Apart from the educational needs, special care is devoted to hygiene and sanitation. Girls are being given awareness on the importance of menstrual hygiene as well. Various talent hunts have been organised which left everyone overawed. The immense enthusiasm and zeal in the people to learn is the main driving factor.

A family kind of environment is being created. The school treats the people of the village as its own students and is unbiased. By adopting a village, the school is making its students sensitive towards the needs of the environment at a young age. It is committed towards raising the leaders of tomorrow.

Q3. Cultural Society Sunshine Public School, Nellore organised an adult literacy camp in its neighbourhood. Write a report in 150-200 words on the camp for your school newsletter. You are P.V. Sunitha, Secretary. Use the following clues: no. of volunteers – hours spent in teaching – location of the class – chairs, blackboards – no. of people attending the camp – benefit.

(SOURCE- CBSE 2017)

Answer:

ADULT LITERACY CAMP

-BY P. V. SUNITHA, SECRETARY

An adult literacy camp was organised by Cultural Society Sunshine Public School, Nellore in the school neighbourhood yesterday extending educational options to those adults, who have lost the opportunity and have crossed the age of formal education. The activities of the camp were carried out by the cultural society of the school and there were a total of 25 volunteers.

The camp began with the welcome speech for the chief guest, Mrs. Kavita Naik, a renowned social worker. 400 people were a part of the camp. They were divided into different groups in accordance with their competencies. They were taught the basics for being able to read and write. Free books and stationery is being provided for quality education. All the arrangements including desks and blackboard were done in advance. Apart from the educational needs, special care was devoted to hygiene and sanitation. They were taught basics of cleanliness like types of wastes

and their management. Refreshments were also provided to the participants. The immense enthusiasm and zeal in the people to learn was the main driving factor.

The chief guest distributed the certificates of participation among the volunteers. The camp ended on a positive note. There was an atmosphere of learning and growing together.

Q4. Independence Day was celebrated in your school. District Magistrate, Ms. Indu Bala Sharma was the Chief Guest. Write a report on the function in 150-200 words describing all the activities that took place. You are Head boy/Head girl.

(SOURCE- 2017 COMPARTMENT)

Answer:

GD Goenka School celebrated the Independence Day with great enthusiasm and patriotic fervour. On the morning of August 14, 2018, our students presented hand-made greeting cards and tri-colour flag badges to the senior management functionaries of the school.

The cultural programme at school commenced with everyone singing 'Vande Mataram' followed by flag hoisting by the chief guest, Ms. Indu Bala Sharma, the District Magistrate. The spirit of freedom and nationalism was well exhibited by the students as well as the teachers through a spectrum of patriotic poems, speeches, quiz on freedom fighter, songs and dance. Committed to the task of nation building, both faculty and student teachers pledged to serve their motherland through spreading education and serving the community. A presentation on the historical evolution of the national flag of India was shown. A documentary on the contribution of unsung heroes of Indian freedom struggle like Tirupur Kumaran, Kamla Devi Chattopadhyay and Khudiram Bose enlightened the audience. A few of them spoke on the history and significance of the Independence Day and shed light on the special highlight of celebrations this year.

It ended with a speech by the principal on the topic, "What does freedom mean to me?" The celebration concluded with the inspiring words of the principal madam, followed by the National Anthem and the distribution of refreshments.

Topic-Setting Program to Advance Cutting-Edge

Humanities and Social Sciences Research

(Responding to Real Society)

Feasibility reports

A feasibility report is written so that the decision makers can decide on the course of action by assessing whether it is feasible or not. It may help in the difficult task of choosing between viable options. Recommendations, or feasibility reports as they are called here, go one step further than any other reports. They not only provide information but argue for certain courses of action to build or not to build, to purchase or not to purchase.

Feasibility reports present information to prove whether a project can be done and whether it is worth doing. For example, a company may benefit from a new technology: but no one is sure whether the expense, the downtime, and the pay-off will be worth it or a community may be considering a plan to build some new facility or to start some new program: but people disagree about its value or potential benefit to the community. Again, a feasibility report tries to answer these questions.

So the structure of a feasibility report should address for whom and why is this feasibility report written? If the report is based on a survey, then by whom, where and how was the survey carried out? what is the purpose of this report?

A sample is provided below.

No. A 03

Feasibility Report for Setting Up a New Industrial Unit at Kolaghat

Submitted to: The Department of Industries, Government of West Bengal

Submitted by: Rahul Bose

Project Manager

Bharat Consultancy Services

September 12, 2009

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Acknowledgements

I would like to thank our Managing Director, V. Prakasam, for entrusting me with the responsibility of preparing a feasibility report for setting up a new industrial unit.

I also wish to thank Mr. N. Tarafdar, Chairman of the Kolaghat Industrial Association, for offering me the necessary support.

I take this opportunity to put on record my appreciation to the team that helped me carry out the survey. Finally, I express my gratitude to my colleague, Amit Kumar for his support.

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Abstract

A survey was carried out by me to consider the feasibility of setting up a new industrial unit at Kolaghat. The various findings and recommendations are given in this report to enable the company to take a decision on the matter.

Feasibility Report for Setting Up a New Industrial Unit at Kolaghat

Introduction

The present report has been prepared for submission to the Department of Industries, Government of West Bengal. The report deals with the feasibility of setting up a new industrial unit at Kolaghat town on the Kolkata-Mumbai highway. The reasons for considering this are that (i) there is a power plant in Kolaghat which is doing well, and (ii) the place seems to have potential for further development.

Methods of investigation

A market survey was carried out in January and February 2009. Industrialists were interviewed. The GM of the Kolaghat Thermal Power Plant was interviewed over the phone. Questionnaires were given to the local people to find out their opinion.

Advantages of the place for setting up a new industrial unit

Description of the selected site: After surveying a number of probable sites in the south-western part of West Bengal, the industrial town of Kolaghat on the Kolkata-Mumbai highway has been selected as a possible location for a new industrial unit.

1. Raw materials like iron ore and coal are easily available from Orissa, Bihar and Jharkhand, and it is not difficult to carry these to the site because of the good transport system available.
2. There is availability of water from the nearby Rupnarayan river and electricity from the Kolaghat Thermal Power Plant which will ensure enough power supply.
3. Availability of land is another big advantage. There are vacant plots of land lying about, and these would be easy to procure and help in the setting up of factory sites.
4. The place is easily accessible by road and the railways. It is well connected by National Highways 6 and 41 and is also well connected to Haldia, Kolkata, and even far off places like Mumbai. Kolaghat is equidistant from Kolkata and Kharagpur and can, therefore, use the manpower and market availability of both these places. The Railways connect Kolaghat to both these places, as well as to the rest of the country. Again, both the Haldia and Kolkata ports are nearby.
5. *Manpower:* Both cheap unskilled and semi-skilled manpower are available. The nearby engineering college will be supply some of the skilled manpower.

Possible drawbacks of the place

1. The survey indicates that there could be lack of civil engineers and similar skilled people. They may have to be recruited from outside. However, highly skilled computer engineers, electrical engineers and electronics engineers would be available since there is a reputed engineering college nearby which however does not offer civil engineering course.
2. Lack of recreational facilities and state-of-the-art medical facilities in the nearby area could affect the lives of the employees of the proposed new industrial unit.

Conclusion

In this particular report, the choice is between whether to set up a new industrial unit or not. After weighing both the pros and cons, we can say that there are more points in favour of setting up a new industrial unit.

Recommendations

Skilled workers can be recommended from outside. The company should also set up its own school and medical unit in order to serve the employees. However, in view of the availability of land and other facilities, such as raw materials, water, transport, labour, the present demand and future prospects and the availability of funds, it would be physically, technically and monetarily feasible to set up a new industrial unit at Kolaghat.

(Signature)

Rahul Bose

Project Manager

Bharat Consultancy Services

Progress Report

Writing a Progress Report

The following are excerpts from the Elements of Technical Writing

Progress reports follow fairly standard formats.

Introduction

An introduction must do these two things:

!"Announce the subject of the report

!"Announce the purpose of the report by Thomas E. Pearsall

In other words, tell your readers what you are talking about and why. Make clear what work you are reporting and why.

Project Description

Briefly describe the work being done, being sure to state its purpose and scope.

The scope statement breaks the work down into its component tasks.

Work Completed

Tell the reader what you have accomplished to date. In a long running project, requiring several

Progress reports covering several periods, you might divide this section further as follows:

Summary of work accomplished in preceding periods

Work accomplished in the reporting period

Work Planned for Future Periods

Work planned for the next period

Work planned for future periods

Appraisal of Progress

Evaluate your progress. Indicate where you are ahead of plan and where you are behind.

As in all writing, don't complicate your progress reports any more than necessary, but do answer thoroughly these three basic questions

- 1) What have you done?
- 2) What are you going to do next?
- 3) How are you doing?

A sample:

Progress Report

"Stratigraphic Architecture of Deep-Ramp Carbonates: Implications for Deposition of Volcanic Ashes, Salona and Coburn Formations, Central Pennsylvania"
by John Lerner

SCOPE AND PURPOSE

The Late Middle Ordovician-age Salona and Coburn formations of central Pennsylvania show cyclic patterns on a scale of tens of meters. Little research has been done on sequence stratigraphy of deep-water mixed carbonate/siliciclastic systems, and a depositional model for this environment is necessary to understand the timing and processes of deposition. The stratigraphic position of the bentonites at the base of the larger cycles is significant because it indicates that they accumulated during a time of non-deposition in a deep water environment.

PROGRESS

To date, I have described five lithofacies present in the Salona and Coburn formations. Two lithofacies are interpreted as storm deposits and make up the limestone component of the thinly-bedded couplets. Some trends were observed in the raw data; however, because of the "noisy" nature of the data, a plot of the five-point moving average of bed thickness was created to define the cycles better.

ADDITIONAL WORK

Two key tasks are to be completed in the coming weeks. With the results of these tests and the field observations, I will create a model for deposition of a deep-ramp mixed carbonate/siliciclastic system in a foreland basin environment. The model will include depositional processes, stratigraphic architecture, and tectonic setting.

REMAINING QUESTIONS

Questions remain regarding the depositional processes responsible for the featureless micrite at the base of the Salona Formation. . . . How rapid was the transition? What record (if any?) remains of the transition? Were bentonites not deposited, or were they selectively removed at certain locations by erosive storm processes?

EXPECTED RESULTS

I expect to find that the large-scale cycles represent parasequences. Flooding surfaces are marked by bentonites and shales, with bentonites removed in some locations. If the cycles are true parasequences, the implication is that eustatic sea level changes and not tectonic influences controlled the depositional changes over the interval.

Project Report

❖ Meaning of Project Report

A Project Report is a document which **provides details on the overall picture of the proposed business**. The project report gives an account of the project proposal to ascertain the prospects of the proposed plan/activity.

Project Report is a **written document** relating to any investment. It contains data on the basis of which the project has been appraised and found feasible. It consists of information on economic, technical, financial, managerial and production aspects. It enables the entrepreneur to know the inputs and helps him to obtain loans from banks or financial Institutions.

The project report contains detailed information about Land and buildings required, Manufacturing Capacity per annum, Manufacturing Process, Machinery & equipment along with their prices and specifications, Requirements of raw materials, Requirements of Power & Water, Manpower needs, Marketing Cost of the project, production, financial analyses and economic viability of the project.

Contents of a Project Report

Following are the contents of a project report:

1. General Information

A project report must provide information about the details of the industry to which the project belongs to. It must give information about the past experience, present status, problems and future prospects of the industry. It must give information about the product to be manufactured and the reasons for selecting the product if the proposed business is a manufacturing unit. It must spell out the demand for the product in the local, national and the global market. It should clearly identify the alternatives of business and should clarify the reasons for starting the business.

2. Executive Summary

A project report must state the objectives of the business and the methods through which the business can attain success. The overall picture of the business with regard to capital, operations, methods of functioning and execution of the business must be stated in the project report. It must mention the assumptions and the risks generally involved in the business.

3. Organization Summary

The project report should indicate the organization structure and pattern proposed for the unit. It must state whether the ownership is based on sole proprietorship, partnership or joint stock company. It must provide information about the bio data of the promoters including financial soundness. The name, address, age qualification and experience of the proprietors or promoters of the proposed business must be stated in the project report.

4. Project Description

A brief description of the project must be stated and must give details about the following:

- Location of the site,
- Raw material requirements,
- Target of production,
- Area required for the work shed,
- Power requirements,
- Fuel requirements,
- Water requirements,
- Employment requirements of skilled and unskilled labour,
- Technology selected for the project,
- Production process,

- Projected production volumes, unit prices,
- Pollution treatment plants required.

If the business is service oriented, then it must state the type of services rendered to customers. It should state the method of providing service to customers in detail.

5. Marketing Plan

The project report must clearly state the total expected demand for the product. It must state the price at which the product can be sold in the market. It must also mention the strategies to be employed to capture the market. If any, after sale service is provided that must also be stated in the project. It must describe the mode of distribution of the product from the production unit to the market. Project report must state the following:

- Type of customers,
- Target markets,
- Nature of market,
- Market segmentation,
- Future prospects of the market,
- Sales objectives,
- Marketing Cost of the project,
- Market share of proposed venture,
- Demand for the product in the local, national and the global market,
- It must indicate potential users of products and distribution channels to be used for distributing the product.

6. Capital Structure and operating cost

The project report must describe the total capital requirements of the project. It must state the source of finance, it must also indicate the extent of owner's funds and borrowed funds. Working capital requirements must be stated and the source of supply should also be indicated in the project. Estimate of total project cost, must be broken down into land, construction of buildings and civil works, plant and machinery, miscellaneous fixed assets, preliminary and preoperative expenses and working capital. Proposed financial structure of venture must indicate the expected sources and terms of equity and debt financing. This section must also spell out the operating cost.

7. Management Plan

The project report should state the following.

- a. Business experience of the promoters of the business,
- b. Details about the management team,
- c. Duties and responsibilities of team members,
- d. Current personnel needs of the organization,
- e. Methods of managing the business,
- f. Plans for hiring and training personnel,
- g. Programmes and policies of the management.

8. Financial Aspects

In order to judge the profitability of the business a projected profit and loss account and balance sheet must be presented in the project report. It must show the estimated sales revenue, cost of production, gross profit and net profit likely to be earned by the proposed unit. In addition to the above, a projected balance sheet, cash flow statement and funds flow statement must be prepared every year and at least for a period of 3 to 5 years. The income statement and cash flow projections should include a three-year summary, detail by month for the first year, and detail by quarter for the second and third years. Break-even point and rate of return on

investment must be stated in the project report. The accounting system and the inventory control system will be used is generally addressed in this section of the project report. The project report must state whether the business is financially and economically viable.

9. Technical Aspects

Project report provides information about the technology and technical aspects of a project. It covers information on Technology selected for the project, Production process, capacity of machinery, pollution control plants etc.

10. Project Implementation

Every proposed business unit must draw a time table for the project. It must indicate the time within the activities involved in establishing the enterprise can be completed. Implementation schemes show the timetable envisaged for project preparation and completion.

11. Social responsibility

The proposed units draws inputs from the society. Hence its contribution to the society in the form of employment, income, exports and infrastructure. The output of the business must be indicated in the project report.

❖ What is a detailed project report and how does it differs from feasibility study report?

Feasibility study report is prepared to support the investment proposal. Feasibilities for the various aspects related to technical, commercial and financial are examined in detail by the experts and consultants brought in feasibility study report. Feasibility study report is termed as a techno economic feasibility study. It is the primary report for the formulation of the investment proposal.

Detailed project report is a complete document for investment decision-making, approval, planning whereas feasibility study report is a base document for investment decision-making. A Detailed project report is a base document for planning the project and implementing the project.

Writing Evaluation Report of a Project

A clear, concise, brief and yet complete guide on writing mid-term or final evaluation report for a Project of any kind.

1. Executive Summary

The executive summary of an evaluation report is a shortened version of the full report. It highlights the purpose of the evaluation, key questions, research methodology, evaluation findings, conclusions and recommendations.

This summary provides a condensed version of the different sections – usually one to four pages – and is placed at the start of the report. To write an effective summary, the original document must be fully read with key ideas and important points highlighted. Re-write the highlighted sentences briefly, skipping the unimportant details. The executive summary should contain the following details in brief form:

- Background
- Purpose/Objective
- Methodology
- Key Findings and Conclusions
- Lessons Learned: Recommendations that can be generalized beyond the specific case to apply to programs globally
- Recommendations: Overall suggestions of how the project/program can be improved based on the findings

2. Introduction to the Project

It is a brief summary of the background of the project, its objectives, planned outputs, outcomes, impacts and stakeholders of the project. Introduction to the project states what the project aims to achieve and what measures are to be taken

for this purpose. Here information about the project team, target area and donors can also be provided briefly.

3. Purpose of the Evaluation

It is a statement of why the assessment is needed, how it will benefit the program/project. In this section the evaluator should state the purpose of this practice that may be to assess the degree of achievements of the objectives and results of the project, as outlined in the proposal. The purpose of the evaluation is usually mentioned in the Request for Proposal (RFP) too, so that document can also be used as reference here.

4. Objectives of the Evaluation

Objectives of the evaluation include assessing the relevance, effectiveness, efficiency, impacts and sustainability of the project and its activities. These should be realistic, in line with the RFP and the given resources (time and money). Objectives of the evaluation can also include what challenges were faced during implementation of the project, important lessons learned and recommendations for the future project implementation.

Sometimes the main purpose of the evaluation can be to focus on the **process** of implementation rather than on its impact, since this would be minimal if the project has started short time ago or was a short duration project. In this case it would also be important to access the participatory approaches used to identify project beneficiaries and the communities' role in implementing and monitoring the project.

a. Problems and Needs (Relevance)

- Is the overall project design relevant to the specific needs of the target population?

b. Achievement of Purpose (Effectiveness)

- To what extent does the intended outputs and outcomes level indicators achieved in relation to targets set up in the project document;
- How effective and appropriate is the project approach?

- How well was beneficiaries' and stakeholders' (including government) participation incorporated in the project cycle?
- What was the quality of the M&E system?

c. Sound management and value for money (Efficiency)

- How far funding, staff, time and other resources contributing to or hindering the achievement of the results. Is 'Value for money' achieving?

d. Achievement of wider effects (Impact)

- Will the project activities be helpful in impacting the lives of the people? If the project is a short-term, care should be taken about committing for long term impacts. What difference is expected in the lives of those targeted in the project as compare the project baseline initial bench marks?
- Who were the direct and indirect/wider beneficiaries of the project?

e. Likely continuation of achieved results (Sustainability)

- What were the prospects for the benefits of the project being sustained after the funding will be over?
- How was the exit strategy defined, and how this will be managed at the end of the funding period?

5. Methodology

The evaluator should make use of this section to define what methods of research (Quantitative / qualitative) did he/she used, what documents/reports did he/she study, how was the sampling done and how did he/she arranged for knowing about the community's feedback on the project. In short, the evaluator should mention all of the sources of data collection, sampling techniques used, methods of data collection (e.g. surveys, FGDs, key informant interviews, staff debriefing), data analysis and documentation. Here he/she can also select or finalize the key areas of investigation like:

1. Impact on beneficiaries and the community

2. Community participation
3. Selection and processing of beneficiaries
4. Project management and overall implementation process

It would also be necessary to include the limitations of the methodology, if any.

6. Evaluation Findings

Here the evaluator can discuss whether the project has adequate number of qualified and experienced staff and whether they are performing their duties to the required performance level or not. Details about individual staff members involved in the project can be included either as part of this section or in the appendix, depending on the length and importance of this information.

a. Relevance

The evaluator should answer at least the following questions with regards to the project being evaluated:

- What activities were planned/implemented and how relevant the activities are in the context of what is to be achieved in the outcomes/impact
- Can it really bring lasting changes in the community?
- Are the activities culturally relevant?
- What are the shortcomings in the relevance of the planned activities in the proposal?
- To what extent the objectives of the project are still valid etc.

b. Effectiveness

- What is the degree of effectiveness of the activities on the lives of the people?
- To what extent were the objectives achieved
- Are people engaging and taking ownership of the project?

- What were the challenging factors?

c. Efficiency

Efficiency of the project should be assessed against its costs, human resources and time. Answers to following questions should be found out:

- Are the outputs completed in specified time and allocated budget?
- Is the Burn rate of the project OK?
- Were activities cost efficient?
- Were objectives achieved on time?
- What alternatives were available and Was the best of the alternatives was chosen in implementing activities?

d. Impact

This involves evaluation of all the social, economic and environmental changes, direct or indirect, intended or unintended, produced by the project. An impact evaluation assesses changes in the well-being of individuals, households, communities or firms that can be attributed to a particular project, program or policy. The main impact evaluation question is what would have happened to the beneficiaries if they had not received the program. The evaluator can gauge the number of beneficiaries and see what real difference has the project or its activities made in the lives of the people?

Impact evaluation provides feedback to help improve the design of programs and policies. In addition to providing for improved accountability, impact evaluations are a tool for dynamic learning, allowing policymakers to improve ongoing programs and ultimately better allocate funds across programs. Information generated by impact evaluations informs decisions on whether to expand, modify, or eliminate a particular policy or program and can be used in prioritizing public actions.

e. Sustainability

Sustainability or exit strategy of a project is a plan describing how the program will continue to achieve its goal after the project funding has exhausted. The community should be the main stakeholder in planning an exit strategy, as they are the most expert on their communities. Exit Strategies, when planned and implemented correctly, can be a springboard for sustainable development.

The evaluator should answer the following questions:

- Will the project benefits continue after completion of the project?
- Is there an exit strategy? Is it being implemented?
- How effective is the exit strategy?
- Will the project be sustainable through this strategy? What are the challenges in carrying out the exit strategy?

7. Strengths of the Project/Organization

The evaluator should use this section to portray the strengths of the organization like staff commitment, staff efficiency, organizational links and strong local presence, level of government support, availability of resources (field office, equipment etc.), successful activities of project implementation etc.

8. Areas of Improvement

Equipping field office, staff capacity building, staff turnover, increasing community involvement, improvement in checks and balances system (M&E), planning and implementation, sustainability strategy (exit strategy), security issues, linkages between outputs, outcomes and impact.

9. Conclusions

10. Recommendations

Recommendations/solutions. Evaluations often make recommendations about how a program can be improved, how the risk of program failure can be reduced or whether a program should continue. However, the inclusion of recommendations is based upon the provided terms of reference for the evaluation. These should be

formed on the basis of the evaluation findings and processes which involve all the stakeholders.

11. Annexes



BUSINESS PROPOSALS

A business proposal is a written document sent to a prospective client in order to obtain a specific job. Proposals may be solicited or unsolicited.

A client may simply request a proposal on a project in the course of a sales call by saying: "You know, that sounds interesting. Why don't you send me a proposal on that." In other cases the proposal may be a formal solicitation, usually called an RFP (request for proposal). RFPs are almost always documents, too. They specify the product or service to be provided, the qualifications sought, and the deadline for submission. Solicited proposals, obviously, mean that the client has already decided to make a purchase. Only the selection of a vendor remains to be done. An

unsolicited proposal, by contrast, is often a sales presentation dressed in another cloak—but the proposal is specifically aimed at a well-defined and limited activity. An example of an unsolicited proposal is the submission of the outline of a book to a publisher arguing the popularity of the subject, the novelty of the approach, and the merits of the author.

Business proposals must be distinguished from *estimates*. In many fields where small business is active, estimates serve the same purpose as a proposal. They are the document that clinches the sale of a roofing or a paving job or a monthly house-cleaning service. But where estimates are used, the qualifications of the seller and his or her method of accomplishing the job are also established, but by other means—typically by an interview or sales call. Sometimes the seller is assumed to fit the job because the business already enjoys a good reputation. Proposals, on the other hand, usually involve complex or unusual one-time services like landscaping a park, surveying a market, or building a refinery. In these cases the approach to the job, the design, the implementation, the schedule, and even the aesthetics require more than simply a dollar estimate.

Many service businesses operate entirely on the basis of proposal. In other cases a proposal is sometimes required, sometimes not. In highly technical fields, the proposal may be filled with dry listings of engineering specifications and/or process details. But it is vital to remember that proposals are always first and foremost sales documents.

Business proposal:

Definition

A document that is systematic, factual, and persuasive description offers a solution to a problem or a course of action in response to a need. The act of offering or suggesting

- Something for acceptance, adoption, or performance
- Proposed a plan or scheme.
- An offer or suggestion.

- A proposal is a document that requests support-usually money- for work a proposer wants to do what makes a proposal is that it asks the audience to approve, fund, or grant permission to do the proposed project.

Types of proposals:

Internal: Written to someone within an organization.

Ex: The Chairman of a company asks the personnel manager to develop a training program for new recruits.

External proposals: Written from one separate, independent organization or individual to another such identity

Ex: An independent consultant can propose to do a project for another firm

Solicited Proposal: If a proposal is solicited, the recipient of the proposal in some way requested the proposal. Solicited proposals are written in response to published requirements.

Unsolicited Proposals: Those in which the recipient has not requested proposals. With unsolicited proposals, you sometimes must convince the recipient and mostly marketing brochures.

ELEMENTS OF THE BUSINESS PROPOSAL

In most industries proposals have a well-defined format specific to the field. Examples might be providing electrical wiring services to a major high-rise or pouring foundations for a suburban development. In such cases the bidder should first obtain old proposals and follow the structure typically used by his trade in that market. In professions such as architecture and landscaping a visual presentation, sometimes even a model, is central to the sale. The same holds for an advertising proposal. In these three areas—there are others as well—the actual presentation is usually a meeting. Any document is supplemental and tends to summarize the presentation with additional so-called "boiler plate," i.e., administrative details.

What follows here is a discussion of more general proposals, usually associated with studies, surveys, or service activities (e.g., protective services for a warehouse complex). In such proposals the following general structure applies.

All proposals have at least two distinct pieces: a cover letter and the proposal document itself. In addition, sometimes, one or more appendices may be provided with charts, graphs, photographs, maps, and so on. Brief proposals, also sometimes known as "letter proposals," combine the first two pieces into a single submission usually of a maximum of six to eight pages.

The *cover letter* serves as a transmittal document. Many bidders also use the cover letter to provide the essence of the proposal in very abbreviated form, highlight the bidder's qualifications, name the price, and ask for the order.

The proposal document *usually has the following structure*:

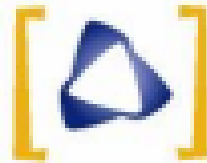
- **Title Page.** This part typically includes your name and the name of your company, the name of the person or company to whom the proposal is submitted, and the date of submission.
- **Table of Contents.** While usually not necessary for shorter proposals, these are sometimes used for complex formal proposals. In cases where different departments of the client will separately review parts of the document, the table of contents is a helpful means of rapidly guiding the reader to such topics as Electrical, Structural, Heating & Cooling (in a building project) or Food Services, Music, Entertainment, Transportation Services (in a project to organize a festival).
- **Executive Summary.** A summary may be included here or may be conveyed in the cover letter.

- **Statement of the Problem/Issue/Job.** This section repeats, in a rephrased manner, the client's objectives and goals as interpreted by the bidder. Including this restatement of the issue is valuable in showing the client that the bidder understands the issue correctly.
- **Approach.** In this section the bidder summarizes his or her proposed approach to solving the client's problem or carrying out the necessary task. The proposed approach is often the key to winning the job—if the price is right—because it shows unique means, modes of thought, or techniques, why they will solve the problem, and why they are superior to alternatives. The section need not be detailed. Details are left to the Methodology. But it presents the strategic elements of the proposal and argues in their favor.
- **Methodology.** This section develops in some detail how the Approach will be carried out. Level of detail should be just sufficient to convey to the client convincingly what will happen without becoming entangled in minutiae.
- **Bidder's Qualifications.** The section presents documentation why this bidder should be chosen on the basis of qualifications, past history, and successful accomplishment of similar jobs in the past.
- **Schedule and Benchmarks.** Major elements of the job are here displayed against a time line. If necessary, specific benchmarks are identified to indicate successful accomplishment of intermediate objectives.
- **Cost Proposal, Payment Schedules, and Legal Matters.** The bidder concludes by presenting the price in as much detail as required in the RFP. It is always wise to specifically pin-point when the bidder expects to obtain partial payments as the work proceeds. If legal matters are involved, they can be placed here. If they are lengthy, they may merit a section of their own.

RFQ: Request for quotation

A request for quotation (RFQ), also known as an invitation for bid (IFB), is

a process in which a firm invites qualified suppliers and contractors to submit price quotes and bids for the opportunity to complete specific tasks or projects. Businesses that want a continuous supply of a particular number of standard products should use the RFQ method. RFQs can be sent before or after a request for proposal (RFP).



Applied Accounting Services

**12250 NE 131st Way, Suite 305
Kirkland, WA 98034
(PH) 425-740-8478 (FX) 425-740-8479
AAServices.com**



August 20, 20xx

Rachel Kenberry
General Manager
Valley Fitness, Inc.
17712 116th Way
Kent, WA 98802

Dear Ms. Kenberry:

Thank you for taking the time to talk with me last week. I know that your business office accounting has been a high priority problem for you. I am therefore pleased to propose a cost effective solution that I believe will minimize your in-house burden.

As I explained when we met, we are specialists in Accounting and Payroll services with more than 40 years of experience. We pride ourselves in providing our clients with a professional service, guaranteed accuracy, and the highest level of confidentiality.

The attached cost summary is based upon your current needs and can be adjusted as we customize your services.

I look forward to discussing this project with you in more detail in the near future. Please contact me directly anytime you have additional questions or requests at 425-740-8478 (ext. 905).

Sincerely,

Marty Trasker
President
Applied Accounting Services

Attach:

Project Proposal Outline

The following is an example of how to write an effective proposal for a course project. The purpose of this example is to show basic ideas that can be implemented on any proposal. We came up with an estimated length of every section, and this is based on the assumption that you are writing a 2-5 page proposal.

1. Introduction

- Sentence to motivate the purpose of your project
- Give a brief summary of the problem that is 1-2 sentences
- Give a brief summary of the solution to that problem, also 1-2 sentences
- Lay out the format for the rest of the proposal. This includes sections or different areas where you emphasize contrasting aspects included in your proposal

2. Motivation

- How did this problem come to be? What is the history behind the development of this problem?
- For what reasons is this a problem that deserves attention? How is it significant or interesting?
- Why does the problem occur, when does it happen, and where can it be located?
- Are there any solutions to the problem that currently exist? Are they effective?
- If there are similar solutions to yours, why will yours be more successful?
- Do you see a way to improve upon current solutions?
- What do you want to achieve with this project? Do not include specific details, but give a general statement about what this project will accomplish.

3. Project details

- Environment (2 paragraphs, possibly a bit more)
 - i. Give a description of the project environment, including languages, software, and hardware.
 - ii. Use diagrams or charts to demonstrate your point, if some are available.
 - iii. What types of software and hardware will be used?
- Issues and challenges for implementation (2-3 paragraphs)
 - i. What are some problems and challenges that you perceive will occur in the process?
 - ii. In what ways are you using or extending existant tools and systems for your problem?
 - iii. What is special about your project? How does it differ from others?
- Deliverables (up to 5 paragraphs)
 - i. What conclusive evidence will the project produce?
 - ii. Do your deliverables have different phases or components?
 - iii. What features do the project's products have?
- Timeline (1 paragraph)
 - i. What is the estimated timeline for completion of the project?

4. Conclusion

- Give a summary of the project including the motivation, problem, and solution.

5. References

- Make sure to include all references used to compile proposal

