



# **Business and Report Writing Skills**

**Version 1.0 2008**

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This module will also be available as an online resource on CSU Interact in the later half of 2008.

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| Learning resource                  | Owner          | Version:           | Summary/Overview of changes |
|------------------------------------|----------------|--------------------|-----------------------------|
| Business and Report Writing Skills | Carissa Michel | 1.0 September 2008 |                             |



## LEARNING IN THE WORKPLACE

To continue to reinforce your learning from this workshop, when you return to your team use the table below to assist you to reflect on the concepts introduced. Your reflection may also incorporate other behaviours that you have observed from other leaders within your workplace as well. You should aim to identify at least 10 different situations.

As part of your reflection, identify some of your key strengths and opportunities for improvement in the way you apply business and report writing skills within the workplace. What steps might you be able to take to improve your own practice?

|                                                                                                                  |  |
|------------------------------------------------------------------------------------------------------------------|--|
| What was the outcome?<br>Describe this in terms of the characteristics of effective business and report writing. |  |
| What attributes of effective business and report writing did you display?                                        |  |
| How have you applied this? Try to think of a specific work situation                                             |  |
| Effective business and report writing concepts                                                                   |  |

## PROGRAM OVERVIEW

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This program is designed to introduce some of the key concepts and skills supporting business and report writing at Charles Sturt University (CSU).

Although this program does highlight many important areas of business and report writing, further application of the concepts, principles and skills will help to refine and reinforce your practice. To this end, you are encouraged to expand your knowledge and skills by taking up work based or other, more formalised learning opportunities at the programs conclusion.

### Program Objectives:

The key objectives of this program are to assist participants:

- 1.) To develop or continue their understanding of Business Writing, Report Writing and Business Reporting Language (BRL) at CSU;
- 2.) Familiarisation with CSU Business documents, templates and current workplace practices at CSU;
- 3.) Identify resources and strategies to help build greater business and report writing ability.

## ICONS

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The following icons appear within this learning resource. They highlight important information as well as activities that can be completed:

|                                                                                     |                                                                  |
|-------------------------------------------------------------------------------------|------------------------------------------------------------------|
|  | These are the outcomes that relate to a section of the resource. |
|  | An Individual or group exercise.                                 |
|  | A key message or important point                                 |
|  | Self-reflection                                                  |
|  | This is a workplace activity                                     |

## SESSION PLAN

| Time 6-7 hours       | Activity                                                                                      | Critical Points                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 09.00 – 09.10        | Introduction and Objectives, session outline                                                  | Trainer and Training Intro<br>Emergency Evacuation / housekeeping<br>Objectives of session.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 09:10 – 9.30         | Purpose of Effective Writing                                                                  | <b>Activity</b> (10 min plus discussion) – What your messages reveal about you and your company. Groups discuss, feedback and facilitator writes up on butchers paper.                                                                                                                                                                                                                                                                                                                                                                                                         |
| 09.30 – 10.30        | Different styles of correspondence and CSU templates                                          | In this section we will discuss briefly the memo, email, business letters, business cases, minutes and agendas, as well as media releases. Examples of CSU templates are provided for all when available. <b>LINK to CSU templates. Style manual:</b><br><a href="http://www.csu.edu.au/division/marketing/stylemanual/appli/letterhead.html">http://www.csu.edu.au/division/marketing/stylemanual/appli/letterhead.html</a><br><b>Business Case:</b><br><a href="http://www.csu.edu.au/adminman/leg/buscasetemp.doc">http://www.csu.edu.au/adminman/leg/buscasetemp.doc</a> . |
| <b>10.30 – 10.40</b> | <b>MORNING TEA BREAK</b>                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 10.40 – 11.00        | Writing for a purpose, getting started, planning.                                             | <b>HANDOUT – Key Points to writing a document</b><br><b>Exercise</b> – Using the 5W-H Plan for Writing template formulate a plan for a new idea or proposal you have been thinking about discussing with your area and ask your group to review and give feedback. Key points whole group discussion by facilitator/participants.                                                                                                                                                                                                                                              |
| 11.00 – 11.30        | Ensuring professional documents.                                                              | <b>GRAMMAR: Quick grammar exercise (handout)</b><br><b>HANDOUT</b> – Some basic Grammatical Ideas (Appendix 4)<br>Writing Powerful and Engaging Sentences. Creating Logic and Flow – Be clear, be concise, be complete, be correct, be concrete, be convincing, be courteous.                                                                                                                                                                                                                                                                                                  |
| 11.30 – 11.40        | Common Business Language                                                                      | <b>Define Common Business Language: Link to language document on GOVT website:</b><br><a href="http://www.finance.gov.au/publications/australian-government-information-interoperability-framework/common-business-language.html">http://www.finance.gov.au/publications/australian-government-information-interoperability-framework/common-business-language.html</a>                                                                                                                                                                                                        |
| 11.40 – 11.55        | Effective Emails                                                                              | <b>HANDOUT: Appendix 1 Email Best Practice Guidelines, outline points from presentation</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 11.55 – 12.30        | Reviewing and proofreading CSU styles and standards                                           | <b>Link to</b> Media website resources to help during the editing phase including a glossary of terms and a Quick spelling guide:<br><a href="http://www.csu.edu.au/division/marketing/secure/csually/media_spelling.htm">http://www.csu.edu.au/division/marketing/secure/csually/media_spelling.htm</a><br><b>HANDOUT - Quick tips</b>                                                                                                                                                                                                                                        |
| <b>12.30 – 1.00</b>  | <b>LUNCH BREAK</b>                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 1.00– 1.30           | RMIT exercise, Learning skills website.                                                       | <b>Preview Workplace Activity - RMIT Interactive web resources</b><br><a href="http://www.dlsweb.rmit.edu.au/lisu/content/4_WritingSkills/writing_tuts/business_%20english_LL/tips/index.html">http://www.dlsweb.rmit.edu.au/lisu/content/4_WritingSkills/writing_tuts/business_%20english_LL/tips/index.html</a><br><b>Preview Workplace Learning activity:</b> Student services learning skills website: <a href="http://www.csu.edu.au/division/studserv/learning/">http://www.csu.edu.au/division/studserv/learning/</a> .                                                 |
| 1.30 – 2.00          | Report Writing, purpose, planning, structure                                                  | Go over structure of reports as per notes and DLS guidelines. Link to Project Status Report Template, other templates on PSC website.                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 2.00 – 2.30          | Initiatives Management Process at CSU. Representing Data Visually. Referencing Styles at CSU. | <b>Link to</b> Initiatives Management Process at CSU online form:<br><a href="http://www.csu.edu.au/division/psc/initiatives/form.htm">http://www.csu.edu.au/division/psc/initiatives/form.htm</a><br><b>Go over different examples of visual data, pros and cons . Go over CSU referencing doc Appendix 6:</b><br><a href="http://www.csu.edu.au/division/studserv/learning/pdfs/apa2008.pdf">http://www.csu.edu.au/division/studserv/learning/pdfs/apa2008.pdf</a>                                                                                                           |

| <b>Time 6-7 hours</b> | <b>Activity</b>                                                   | <b>Critical Points</b>                                                                                                                                                                                                                       |
|-----------------------|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2.30pm – 2.40         | Common abbreviations, quotations and admitting biases, quick tips | Go over as per manual, quick tips doc page 71                                                                                                                                                                                                |
| <b>2.40 – 3.00</b>    | <b>AFTERNOON TEA BREAK</b>                                        |                                                                                                                                                                                                                                              |
| 3.00pm – 3.15         | Critique your report                                              | <b><u>Group Exercise Critique your report:</u></b>                                                                                                                                                                                           |
| 3.15pm – 3.45         | Draft a brief report                                              | <b><u>GROUP ACTIVITY – Draft a Brief Report Outline and if time the beginnings of your report</u></b> : Nominate a scribe to write on butchers paper. Group discussion to follow.                                                            |
| 3.45 – 3.55           | Summary (Conclusion) and Application, further learning            | Conclusion, key points from the day<br><b><u>Group Exercise:</u></b> What have you learned today that you can take back to your team and put into practice in your workplace?<br>Further reading and resources. <b><u>ANY Questions?</u></b> |
| 3.55 – 4.00           | Evaluation                                                        | Complete evaluation forms                                                                                                                                                                                                                    |

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**PART 1: BUSINESS WRITING****PURPOSE OF EFFECTIVE WRITING****Why write?**

In business, in the workplace, and in our personal lives, we all stand to benefit from more effective communication skills. Writing is essential to communicate your message clearly and professionally and to incite action in those who you supervise, work with and require action from.

Many in the workforce today struggle with the basics of writing including grammar, spelling and punctuation and this is what can hold them back and reduce their confidence when it comes to business documents. The style and skills required for formal business writing are best developed by practice and experience, but with the right tools and know-how it is not hard to improve.

*“The objective of communication is not the transmission but the reception.”*

Source: Dr Gerard M Blair (1991 – 1993)

**Adjusting writing style to suit topic and reader requirements**

You must adapt the content, tone and language of your documents to the situation (context) and intended audience of your communication.

Some business documents and topics require more formal language than others. If unsure seek clarification before starting. For example, documents such as briefing notes, proposals, operational reports and scientific/research reports will require more formal language than memos to the social committee or emails to colleagues.

Use “you” more than you use “I” or “we”.

Use a writing style that is appropriate to the reader

Write from the reader’s point of view, focus on their needs as well as benefits to them.

Example:

| WRITER’S VIEWPOINT                                    | READER’S VIEWPOINT                                                 |
|-------------------------------------------------------|--------------------------------------------------------------------|
| Our copier makes the best copies on the market today. | Your copies will be the best you’ve seen, when you use our copier. |

Consider these factors about your readers before composing your draft:

| Personality type:  | Technical level: | Operational role:  |
|--------------------|------------------|--------------------|
| detail-oriented    | expert           | ultimate authority |
| pragmatic          | informed         | user               |
| consensus-oriented | initiated        | gatekeeper.        |
| visionary.         | uninitiated.     |                    |

**Based on:** Flanagan, S. (2007), *Business Writing Skills*. For CSU Division of Human Resources Page 9.



### Activity – What your messages reveal about you and your company

With business writing, the pressure is on to communicate a clear and concise message with consideration for the reader in mind.

When you are writing a business letter, you want to enhance not only your image but your company's image as well. Although it seems unfair, the truth is readers will equate weaknesses in your letters with weaknesses in you, or your company. What impressions do you get from business writing with the following characteristics?

| Characteristic                                                 | Impressions |
|----------------------------------------------------------------|-------------|
| Typographical and spelling errors                              |             |
| Stiff & formal writing style                                   |             |
| Lots of big, complex words                                     |             |
| Very short, concise sentences                                  |             |
| Smudges on paper, tiny margins and weird spacing between lines |             |

**Source:** Flanagan, S. (2007), *Business Writing Skills*. For CSU Division of Human Resources Page 7.

## DIFFERENT STYLES OF CORRESPONDENCE AND CSU TEMPLATES

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In this section we will discuss briefly the memo, email (covered in more detail later in the module), business letters, business cases, minutes and agendas, as well as media releases. Examples of CSU templates are provided for all when available.

### MEMORANDUM (MEMO)

A memorandum (memo) is a piece of correspondence used within an organisation or among various branches or divisions of the same organisation. A memo is usually sent through internal mail or via e-mail.

#### Structure of the Memo

**Organisation name**, usually contained in the letterhead.

**Memo or Memorandum** at or near the top of the page.

**To:** Use the reader's full name with any professional title such as Dr but without the complimentary titles of Mr, Ms or Mrs.

If you are sending the memo to several people, list them after "To". If the list is longer than a dozen names, place it at the end of the memo and reference it on the "To" line. For example:

To: See distribution list on page 6.

**From:** The writer's name and professional title go after this heading.

**Date:** Dating a memo gives the organisation a record of its correspondence.

**Subject:** State the topic in a few words but make sure it communicates the point of the memo. E.g. "Changes in Employee Medical Benefits" is more specific than "Employee Benefits Program".

NOTE: The order and placement of these headings may vary from organisation to organisation.

The "To" line eliminates the need for a salutation (e.g. "Dear Mrs. Bernstein").

#### Message

The content of the memo should consist of a concise introduction, one or more middle paragraphs conveying the details, and perhaps a brief conclusion. Some memos are as short as one paragraph, or even one sentence. Memo length is determined by the purpose and audience.

Memos longer than two pages generally have a more formal structure than shorter ones. A long memo should have the following sections:

- A **summary**, placed at the beginning of the memo, should condense the subject to five or ten lines. It should not contain jargon or highly technical language.

- The **introduction** states the memo's purpose and scope. You may add a paragraph or two of background material if the reader needs more information. The introduction may also be used to ask or answer key questions, thank the reader, or give good news such as the approval of a proposal. If you must refuse a request or reject an offer, use the introduction to establish your reasons before saying "no".
- **Discussion.** You can use various headings to separate your information into sections: e.g. statement of the problem, approach to the problem, analysis, evaluation, conclusion and recommendations. The facts of a situation need to be accurately identified and presented, and the arguments need to be reasoned and supported carefully.
- The **conclusion** summarises the main points and discusses what action is required of the readers.

The "From" line eliminates the need for a complimentary close (e.g. "Yours faithfully").

**Writer's initials** – a memo is completed by the writer's initials, not his/her signature, immediately after the last sentence.

**Distribution list** – names on the distribution list are usually typed in alphabetical order. However, if one of the individuals clearly outranks the others, place that name first.

**Attachments** – if you have attachments, you may list them at the top of the memo or at the end.

**Copies** – a duplicate copy of the memo should be held for future reference.

**Sources:**

Barrass, R. 2002, *Writing at Work: A Guide to Better Writing in Administration, Business and Management*, Routledge, London, pp. 40-41.

Baugh, L.S., Fryar, M. & Thomas, T. 1986, *Handbook for Business Writing*, National Textbook Company, Lincolnwood, Illinois, pp. 119-124.

Searles, G.J. 1999, *Workplace Communications: The Basics*, Allyn & Bacon, Boston, pp. 32-33.

### What a CSU memo should look like

Read carefully the CSU Style Manual guidelines and view the memo template overleaf which can be found at:

<http://www.csu.edu.au/division/marketing/stylemanual>



Tel: +61 2 6338 4732  
Fax: +61 2 6338 4986  
[www.csu.edu.au/division/library](http://www.csu.edu.au/division/library)  
ABN: 83 878 708 551

The Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) Provider Number is 00005F for Charles Sturt University and the Charles Sturt University Language Centre



Business and Report Writing Skills at CSU    Version 1.0 2008

## EMAILS

Emails have quickly become the communication mode of choice as it is quick, reliable and you have the ability to send attachments and/or links to documents.

### What a CSU Email Should look like

When composing an email please carefully consider sensitivity and discretion. CSU Guidelines for Email Best Practice are available in the CSU Administration Manual. **See Appendix 1.**

To maintain a minimum standard visual presentation in the use of email for internal and external University communications, staff are advised to establish official email contact details (also known as an email signature) that are consistent in format, well-presented, easy to read and portray the professionalism appropriate to the University. See excerpt below outlining correct email signature format from the CSU Style Manual.

#### Background

The standard white background should be used for all emails sent on behalf of the University. Coloured backgrounds, pictures, patterns, decorative motifs such as scrolls or leaves can be distracting to the reader and may detract from a professional impression.

#### Font

Acceptable fonts are Times New Roman (preferred) or Arial in 10, 11 or 12 point. Font should be navy blue or black only.

#### Contact details

The contact details on an email amount to sending an electronic University business card. They give an email a professional appearance, and provide appropriate official contact information. The standard white background should be used for all emails sent on behalf of the University. Coloured backgrounds, pictures, patterns, decorative motifs such as scrolls or leaves can be distracting to the reader and may detract from a professional impression. Personal statements and messages are discouraged.

#### First name and surname

These are written in bold in the same font as the email, two points larger. Cursive fonts for the name should be avoided.

#### Job title

This and all categories that follow are written in the same font as the email, plain text.

- Division, School, Faculty, Centre or area
- Charles Sturt University
- Postal address
- External telephone number
- External fax number
- Email address
- CSU web address or URL that directs users to your area

#### An example:

##### Joe Bloggs

Editor  
Division of Marketing  
Charles Sturt University  
Panorama Avenue  
Bathurst NSW 2795  
Ph: 02 6338 4411  
Fax: 02 6338 4378  
jbloggs@csu.edu.au  
[www.csu.edu.au](http://www.csu.edu.au)

**Disclaimer**

The following paragraph should appear at the end of your email signature in standard font, 8 point:

**YOU MUST READ THIS NOTICE**

This email has been sent by Charles Sturt University (CSU) (ABN 83 878 708 551, CRICOS 00005F). This email (and any attachment) is confidential and is intended for the use of the addressee(s) only. If you are not the intended recipient of this email, you must not copy, distribute, take any action in reliance on it or disclose it to anyone. Any confidentiality is not waived or lost by reason of mistaken delivery. The views expressed in this email are not necessarily those of CSU. Email should be checked for viruses and defects before opening. CSU does not accept liability for viruses or any consequence which arise as a result of this email transmission. Email communications with CSU may be subject to automated email filtering, which could result in the delay or deletion of a legitimate email before it is read at CSU.

If your email has any relevance to CSU courses offered to international students within Australia, please include this optional sentence.

**Optional:** The Commonwealth Register of Institutions and Courses for Overseas Students (CRICOS) Provider Numbers for Charles Sturt University are 00005F (NSW), 01947G (VIC) and 02960B (ACT).

Source : <http://www.csu.edu.au/division/marketing/stylemanual/appli/email.html>

**THE BUSINESS LETTER**

A letter is a message written on letterhead paper and addressed to someone outside the organisation. It is usually sent through the mail.

The body of the letter is made up of the introduction, middle and conclusion. The introduction opens the letter, establishes rapport and acknowledges any previous correspondence or contact. The middle of the letter contains all details and information. The conclusion outlines any actions and/or information required along with a polite ending.

Optional parts to a business letter may include an attention line (if you wish to use an attention line place it two returns below the reader's address), subject line/reference initials/reference number (placed two returns below the salutation), enclosure, file number, sender's telephone number, email or website details.

Source: Flanagan, S. (2007), *Business Writing Skills*. For CSU Division of Human Resources Page 16

**Types of letters**

- good news letters – inquiry, request, acknowledgement, introduction to someone/something
- cover, thank-you and acknowledgement letters
- letter to refuse an invitation or request - start with your appreciation for the invitation or request, give a full explanation of why you are refusing, close by expressing interest in the person/organisation or with well wishes for the event.
- bad news letter - open with a courteous greeting, explain the situation, state the bad news, close with a positive paragraph ie how they could improve, encouraging them to apply again in the future.
- Problem, denial or complaint letter.

### General Letter Template

|                                                                       |
|-----------------------------------------------------------------------|
| <b>Letterhead</b><br>Organisation name<br>Address<br>Telephone number |
|-----------------------------------------------------------------------|

<  
 30 September, 2008  
 <  
 Reader's name  
 Address  
 <  
 <  
**Attention: Reader's name and position** (optional)  
 <  
**Private and confidential** (optional)  
 <  
 Dear Mr/Ms [reader's name]  
 <  
 <

Your ref.As/ceZZ/2. Our ref. QWE/99 (optional)

<  
**Subject:** (optional)  
 <

<  
 Introduction, Body, Conclusion.  
 <

<  
 Yours sincerely

<  
 <  
 Writer's signature  
 Name  
 Position

<  
 GK:jp (optional)

<  
 Enclosures (3) (optional)

<  
 Copies: R. Hanlin, Treasurer (optional)  
 M.McKenna, Secretary

See **Appendix 2** for examples of CSU Letters from the Division of Human Resources.

### The AIDA formula of Writing persuasive letters

1. (A) Attention – open with a sentence that catches the reader's attention - hook
2. (I) Interest – show the reader features, benefits or develop an idea that may be of interest to the reader
3. (D) Desire – use the middle paragraphs to build up a picture that moves the reader to action
4. (A) Action – state the action the reader needs to take to achieve what you have promised.

**Source:** Flanagan, S. (2007), *Business Writing Skills*. For CSU Division of Human Resources Page 20

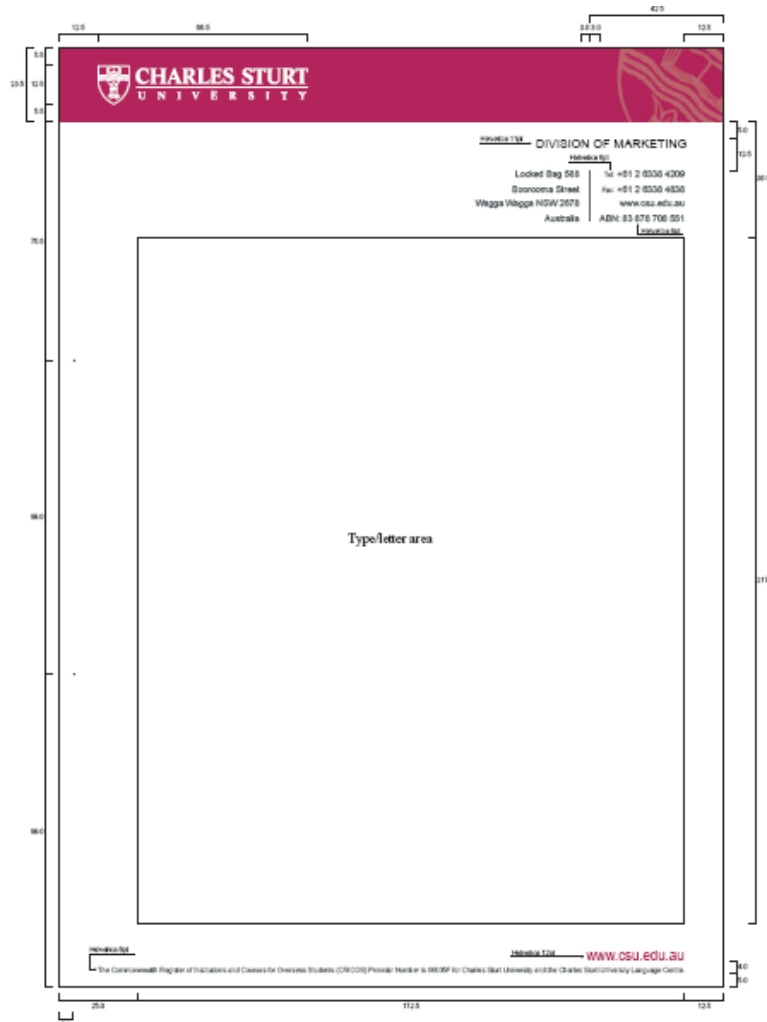
### What a CSU business letter should look like

The CSU letterhead has been designed for use in accordance with the following guidelines for the layout of letters:

- Preferred typeface for typing is Times New Roman (preferred) or Arial in 10,11, or 12 point
- Left margin aligns with the logo typeface, 25 mm from edge of page
- Right margin is 12.5 mm from edge of page
- Top margin is 60 mm from top of page
- Bottom margin is 20 mm from bottom of page
- The letter can be left justified only
- The pre-printed small dots on left side of paper are guides for folding

Read carefully the CSU Style Manual guidelines and view the letter template:

<http://www.csu.edu.au/division/marketing/stylemanual/appli/letterhead.html>



### Exercise – Critique then create a CSU letter

Using the documents you have sourced from your area during the preparation for this module, critique your example letter with your group. Review and provide feedback as if you were the writers' supervisor. Re-write the letter as you believe it should be.

**Business Cases/Proposals/Briefing Notes**

The purpose of a business case or proposal is to identify the needs and objectives of an organisation and outline beneficial strategies for meeting these needs. The Business case should also present a way of evaluating results in order to ensure a high chance of success.

Business cases at CSU are written to obtain funds for research, to solve problems, express interest in a project and to ask for approval for a change or new course of action.

**What a CSU Business Case/Proposal should look like**

All new commercial activities are governed by the Interim Guidelines for Commercial Activities. These Guidelines state that a Scoping Proposal and Business Case need to be completed prior to an activity being approved or commencing. These guidelines can be viewed on the Administration Manual Website at: <http://www.csu.edu.au/adminman/leg/GOV84.rtf>

CSU Business Case templates are also available on the Administration manual website and give comprehensive descriptions and walk you step-by-step through requirements of each section: <http://www.csu.edu.au/adminman/leg/buscasetemp.doc>.

In order to make this an efficient business process, the Office of Corporate Governance (OCG) has developed various categories of commercial activities. These are listed below with a definition and examples of what that category includes, and should be taken into account when writing your Business Case.

**Collaboration** - A general Memorandum of Understanding (MOU) with another education provider, or public or private industry, which will be supplemented by additional formal notes of agreement in respect of specific initiatives. The memorandum is a non-binding agreement that aims to facilitate academic cooperation between the parties in the areas of teaching, learning, research, student and staff exchange and a range of other areas of mutual benefit.

**Consortium** - Activities in which the University has joined with other organisations to form a consortium to develop and/or deliver and/or provide programs to a third party.

**Consultancy** - Activities where the University, or a Faculty or Division, or an employee (OPA), is providing contracted services to third parties, eg. Government funding contracts.

**Community Education** - Provision of: non-award weekend/short courses; study activities to visiting external parties to the University where the University provides lectures and recreational tours; study activities to University staff and students visiting external parties where the external party provides lectures and recreational tours; non-award workshops/seminars through Faculties and Schools to High School students, industry groups and others.

**Industry Training** - Provision of VET training programs and Professional Attainment Programs through the University's Registered Training Organisation (CSU Training) and through the Faculty of Commerce Professional Development Unit, including training funded by industry partners.

**Third Party Course Offering** - Provision of fee-paying courses through Australian or International third party institutions onshore or offshore for Australian and international students.

**Employer Reserved** - Provision of award places under agreement with an employer, e.g. the Diploma of Policing Practice.

**Entity Activities include:**

**Enterprise** - those organisations within the University who operate on E funds, excluding research centres.

**Company** - company limited by guarantee - a company formed on the principle of having the liability of its members limited to the respective amounts that the members undertake to contribute to the property of the company if it is wound up; company limited by shares - a company formed on the principle of having the liability of its members limited to the amount (if any) unpaid on the shares respectively held by them.

**Controlled Entity** - company of the University established for the provision of infrastructure and other services across the campuses.

**Trust/Charitable Fundraising** - activities where assets are held and managed by trustees on behalf of an individual or group.

**Joint Venture** - activities involving a business owned jointly by the University and one or more other independent organisations who continue to function separately in all other respects but pool their resources in a particular line of activity.

**Partnership** - activities whereby the University has entered into a partnership agreement to own and control a company with one or more other organisations. These activities do not have a limited liability.

**Hiring** - Hiring equipment and/or rooms to and/or from external parties.

**Lease** - Activities involving the University leasing facilities and/or equipment and/or land and/or buildings to and/or from external parties.

**Sales** - Selling goods and/or services to external parties.

Proposals come in all shapes and sizes however there is a standard layout to follow when structuring your proposal:

An accepted rule is to keep the body of the report to four parts:

- two pages on how the project will be managed
- two pages for selling the idea and the qualities of the proposing organisation.
- two pages for costs
- two pages for scheduling.

**Source:** Flanagan, S. (2007), Business Writing Skills. For CSU Division of Human Resources Page 24



**Workplace Learning Activity – Creating a business case made simple**

Using the categories of commercial activities outlined above by the OCG, formulate a simple business case using the template provided in the CSU Administration Manual: <http://www.csu.edu.au/adminman/leg/buscasetemp.doc>. Ask your mentor or supervisor to review and give feedback. Would they authorise your idea or purchase based on the information you have provided?

### **Agreements, Joint Ventures or Collaborative Ventures**

Legal Policy and Procedures on Agreements, Joint Ventures or Collaborative Ventures and Delegations for the signing of documents are available in the CSU Administration Manual under: <http://www.csu.edu.au/adminman/leg/leg.htm>. **Appendix 3** shows an example template for a Memorandum of Understanding from the CSU Office of Corporate Governance.

### **Minutes and Agendas**

The Office of Academic Governance (AG) has developed a style manual including templates for Minutes and Agendas to be used by University Committees. The template is available at the following link:

[http://www.csu.edu.au/acad\\_sec/manuals/stylemin.htm](http://www.csu.edu.au/acad_sec/manuals/stylemin.htm)

For more information or for professional development on writing minutes and agendas contact AG 02 6338 4185 or email [secretariat@csu.edu.au](mailto:secretariat@csu.edu.au). For learning resources go to:

[http://www.csu.edu.au/acad\\_sec/manuals/docs/complete\\_workbook.pdf](http://www.csu.edu.au/acad_sec/manuals/docs/complete_workbook.pdf)

### **CSU Templates**

Other templates available to staff can be found throughout various sections of the CSU website including within the Administration Manual: <http://www.csu.edu.au/adminman/leg/leg.htm>, the CSU Style Manual: <http://www.csu.edu.au/division/marketing/stylemanual>, and on the Media Website: [http://www.csu.edu.au/division/marketing/secure/csuoonly/media\\_forms\\_templates.htm](http://www.csu.edu.au/division/marketing/secure/csuoonly/media_forms_templates.htm)

### **Media Releases**

The CSU Media style guide provides guidance, links and a number of resources for writing, spelling and editing copy when working with the media, and as required by CSU.

Refer to these templates which include fonts and layouts, when preparing an official release to ensure consistency:

[http://www.csu.edu.au/division/marketing/secure/csuoonly/media\\_forms\\_templates.htm](http://www.csu.edu.au/division/marketing/secure/csuoonly/media_forms_templates.htm)

## WRITING FOR A PURPOSE

When beginning to write you need to consider:

- Who are you writing to?
- What is the primary purpose of your document?
- Why should the reader care about your message?
- When and where does the action take place?
- What are your expected outcomes?

### Get started

Start by brainstorming and writing down any ideas that come into your mind. Logical order and sequence can be looked at further on but the most important thing is to let the ideas flow at this point.

Once you start doing this you may find that the ideas start coming into your mind quite quickly as one topic brings to mind another related thought or idea and so on.

Write everything down no matter how frivolous as it may turn out to be a brilliant idea down the track when developed more.

The idea of any business correspondence is to convey your thought that will set off some kind of action - instantly or remotely. There are two important points for writing effective communication. The first is, you should know what you want to say and the second is, say it.

#### How to begin:

- |                                                     |                                                                                   |
|-----------------------------------------------------|-----------------------------------------------------------------------------------|
| - research                                          | - write down the facts                                                            |
| - opinions                                          | - brainstorm and write down any idea that comes to you – no matter how ridiculous |
| - fragments are allowed                             | - no editing allowed                                                              |
| - discuss it with someone else, a colleague or peer | - initially write as though you're writing to your best friend                    |
| - relaxation techniques                             | - put it all in perspective                                                       |
| - sleep on it.                                      | - Look at previously developed documents                                          |

Once you have planned your document, write your first draft without attempting to correct yourself as you write. Once you've finished, it would be ideal to set your writing aside for a while before you begin to edit. Otherwise, you'll see what you meant to write, not what you actually wrote.

Source: Flanagan, S. (2007), *Business Writing Skills*. CSU Organisational Development Page 12 & 26.

### Planning and Structure

- All documents should have a structure or format – a logical beginning, middle and end.
- Include a sequential argument
- Adjust the content to suit your audience and their different learning styles
- Study different communication styles – ie: Neuro Linguistic Programming (Grinder and Bandler) the visual, the auditory, Kinaesthetic, Auditory-Digital (AD).
- Keeping your focus and the desirable outcomes in mind
- Organise your material into manageable chunks

***“To fail to prepare is to prepare to fail” Anon***

## Key Points to writing a document:

### Use of language

- Appropriate
- Jargon
- Plain English

### Content

- Simple sentences and or statements
- Use of dot points
- Everything to the point
- This is job specific – use experts in the area, as a trainer I have no idea.

### Living Documents

- Must be written to be changed
- Open mind required
- What triggers change?
- Every time the document is used it is tested.
- Constant continuous improvement

### What triggers change

- Change in procedure
- Change in equipment
- Better way to do the same job
- Organisational change
- Wanting to deliver Best practice

### Writing the documents

- What to write
- How long to write
- Start point and finish point
- Answer the who what when questions

### What to do with the finished draft

- Test the document using someone else to red pen it – don't be “precious” – open mind
- Discuss the suggested changes and include the agreed changes
- Final quality check

### Implement the document

- Sign off – Who? How? Where?
- Document control – how where – electronic or hard copy?
- Storage and use
- Archiving of old documents – using S drive?

### Review documents

- Who? When? How?
- What triggers review?
- Is there a set time or ongoing?

### Cross Campus use of Documents

- Are your systems the same as other campuses?

## The 5W-H Plan for Writing

The template below can be useful to help you start initial preparation or peer discussions for outlining your writing plan.

| TOPIC:   |        |
|----------|--------|
| QUESTION | ANSWER |
| WHO?     |        |
| WHAT?    |        |
| WHERE?   |        |
| WHEN?    |        |
| WHY?     |        |
| HOW?     |        |

Source: Eunson, B. 1996, *Writing at Work*, Wiley & Sons, Brisbane, p. 46.



### Exercise – How to start: Planning your writing

Using the 5W-H Plan for Writing template above formulate a plan for a new idea or proposal you have been thinking about discussing with your supervisor or team.

Discuss your notes within your group and ask them to review it and give you feedback for further ideas or points to remember.

**ideas:** *New equipment, new software, new staff member, casual assistance, starting weekly team meetings with action sheets, updating procedures documents.*

## Steps in Writing Workplace Documents

### PREPARATION

#### Purpose

- Why are you writing? For example, the purpose may be to:
  - inform
  - persuade
  - present a point of view
  - propose ideas
  - report findings
  - recommend a course of action
- What action or outcome are you hoping for?

#### Reader's requirements

- To whom are you writing?
- What does the reader want to know?
- What does the reader know about the topic already?
- What is the reader's attitude to the topic?
- What specific requirements or limitations are there?
- How much detail is required?
- When is the document required?

#### Content

- What information do you need to include?
- Brainstorm and record all ideas that come to mind about the topic. Brainstorming methods include:
  - *Who? What? Where? When? Why? and How? questions;*
  - A mind map of the main concepts, sub-concepts and minor concepts.

#### Method

- What type of document will be the most appropriate? (e.g. memo, letter or report)
- What is the most effective way of sending the message? (e.g. personal delivery, mail, e-mail or fax)

### RESEARCH

You may need to research the topic.

- Record the main points and relevant details.
- Record the source details (i.e. author, title and publishing details) of your research.

### ORGANISATION

- Evaluate each point against the topic and purpose of your document.
- Only retain relevant information.
- Group like points and arrange them under appropriate headings, sub-headings and minor headings.
- Arrange the headings, sub-headings and key points into a logical order. This creates a content outline.

### WRITING THE FIRST DRAFT

- Talk your ideas through with someone else before you start writing. This helps you to express your thoughts clearly.
- Type your first draft quickly. Write what you can, then fill in the missing information later.
- Follow the appropriate document structure.
- Follow your content outline, and use headings, sub-headings and minor headings.

- If desired, use decimal numbering and indentation for the headings, sub-headings and minor headings. For example:

## **1. HEADING**

### **1.1 Sub-heading**

#### **1.1.1 Minor heading**

- Add tables and/or illustrations, if applicable.
- Add layout and formatting features.

## **EDITING THE DRAFT**

- When you have completed the draft, lay it aside for a day or two if possible. You can then criticise it objectively, keeping in mind the desirable qualities it should have.
- Evaluate, correct and improve the draft. Read every word, sentence and paragraph with a view to making constructive changes.
  - Make sentences clearer, tighter, unambiguous and more polished.
  - Remove unnecessary details or words.
  - Add any necessary details that have been omitted.
  - Check that the tense is consistent.
  - Use active voice and first person where possible.
  - Correct the spelling, grammar and punctuation.
  - If the flow needs to be improved, re-arrange the sequence of sentences or paragraphs.
- Check that the writing style is appropriate.

## **RE-DRAFTING**

- Several drafts are usually required in the editing stage.
- An editing checklist is useful for reviewing the final draft.
- It may also be helpful to ask actual or potential members of your audience to provide feedback about the final draft. It should be tested by two groups:
  - people who have been chosen because of their expertise; and
  - people who have been chosen because of their lack of expertise.
- Revise the final draft in line with the feedback.

## **WRITING THE FINAL COPY**

- Type the final copy of the document.
  - Proofread word by word, and figure by figure.
  - Sign and/or type your name or initials at the end of the document.
  - Keep a copy of the final version for your own records.
- Send the document to the reader.

## ENSURING PROFESSIONAL DOCUMENTS



### Exercise – Quick Grammar Exercise

Find the error in the following sentences:

1. Because fragments make it hard to understand your sentence
2. Proofreading your writing can be very interesting you can find out what you have written.
3. While procrastinating and worrying, the exam came closer and closer.
4. The essay had to be handed in to the lecturer that had to be a certain length.
5. Students has to have a good understanding of grammar.
6. Anyone who has not done their grammar assignment must have had something better to do.
7. Studying can be exciting, rewarding and sometimes really annoyed.
8. The only excuse their was , was that there exam had started early.
9. When you use an apostrophe, make sure you know its proper use. Its often used incorrectly.
10. The student didn't get no marks for the assignment.

To find answers go to:

<http://www.csu.edu.au/division/studserv/learning/grammar/answers.htm>

### Grammar Basics

| Term          | Function                                                                   | Examples                                                                   |
|---------------|----------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Nouns         | Names of persons, places, things, qualities or concepts                    | Clinton, child, Jerusalem, plateau, bicycle, sadness, freedom              |
| Verbs         | Express action or being                                                    | Fly, transmit, be, appear                                                  |
| Pronouns      | Substitute for nouns and function as nouns                                 | I, me, myself, mine                                                        |
| Adjectives    | Describe or qualify or modify nouns or pronouns                            | Tall, angry, first                                                         |
| Adverbs       | Modify verbs, adjectives, other adverbs or groups of words                 | Quickly, here, soon                                                        |
| Prepositions  | Show relationships between a noun or pronoun and other words in a sentence | Across, on, during                                                         |
| Conjunctions  | Link words and groups of words                                             | And, but, because                                                          |
| Interjections | Express feelings or attitudes.                                             | Wow! Hey! Say!                                                             |
| Tense         | Describes when an action takes place.                                      | I type/ I typed/ I will type/ I have typed/ I was typing/ I will be typing |

**Grammar Basics continued**

| Term          | Function                                             | Examples                                                                          |
|---------------|------------------------------------------------------|-----------------------------------------------------------------------------------|
| Subject       | The word or group of words that receives the action. | <u>She</u> spoke at the meeting. <u>The two managers</u> attended the function.   |
| Object        | The word or group of words that receives the action. | She spoke <u>at the meeting</u> . The two managers attended <u>the function</u> . |
| Active voice  | The subject in the sentence performs the action.     | I typed the document.                                                             |
| Passive voice | The subject is acted upon, or receives the action.   | The document was typed by me.                                                     |

Source: Flanagan, S. (2007), *Business Writing Skills*. CSU Organisational Development Page 27

**Note:** For more comprehensive information on Grammar, read **Appendix 4** which is an excerpt from Effective Writing workshop 2004 with CSU Human Resources. This excerpt includes comprehensive information on correct grammar, punctuation such as quotations, colons, parentheses, present and past tense, and use of the apostrophe.

**Writing Powerful and Engaging Sentences**

A letter that is well written always contains a friendly undertone, polite terms and is written in common language without jargon. To write well aim to appeal to the readers interest, engaging them by presenting the information in a logical sequence and in an accurate and concise way.

There are four main types of sentence; Simple, compound, complex and a combination.

**Simple sentences**

A simple sentence has a subject, a verb and an object. This type of sentence is used for direct and clear sentences. It is the most powerful type of sentence there is.

**Compound sentences**

A compound sentence links two simple sentences together because they are part of one idea. These are also called “comma, and” sentences because you always need to place a comma before a conjunction (such as and, but, so, for, yet) that links the two sentences.

The media heads have been appointed, and they have almost completed the project.

**Complex sentences**

A complex sentence is one that adds some explanation to your primary statement. It links a main clause with a dependent clause (a clause is a part of a sentence containing a verb and a noun).

The managing director of Coles Myer announced a new advertising strategy that would enable the company's supermarkets to undercut their competition's ratings. (This clause explains the strategy)

**Complex-compound sentences**

Be careful when using these sentences, as it can be easy to lose the sense of what you are trying to say.

Country Road, which has survived two takeovers, had completed designs for overseas markets so that new stores could be opened in the USA which was a hotbed of competition and also subject to the changes in the Australian dollar exchange rate.

Source: Flanagan, S. (2007), *Business Writing Skills*. CSU Organisational Development Page 29

## Creating logic and Flow

### BE CLEAR

- Your writing must be understood at the first reading.
- A business document is clear when it means exactly what the writer intends.
- Avoid technical jargon, unfamiliar words or formal language.

| FORMAL                      | MODERN                  |
|-----------------------------|-------------------------|
| Payment has been duly noted | We received your cheque |
| Attached hereto please find | Attached is             |
| Pursuant to your request    | As requested            |
| Acquaint you with the facts | Tell you                |

| JARGON                                                                     | JARGON-FREE                                                         |
|----------------------------------------------------------------------------|---------------------------------------------------------------------|
| Our facilitator will interface with the new communication systems network. | Our administrative assistant will operate the new telephone system. |

- Eliminate ambiguity, i.e. avoid using a word with a double meaning or misplacing a phrase within a sentence.

#### Examples: Ambiguity

“We are committed to eliminating all traces of discrimination in the law against women.”  
(Is there a law against women?)

“Staff members who had been hired unofficially complained to the union.”  
(Were they hired unofficially, or did they complain unofficially?)

- Avoid colloquialisms, clichés and hackneyed expressions.

#### Examples: Clichés

| CLICHÉ              | MEANING/<br>ALTERNATIVE EXPRESSION              |
|---------------------|-------------------------------------------------|
| Bottom line         | Situation, essence, final position, total, goal |
| In a nutshell       | In short                                        |
| In the long run     | Finally                                         |
| In this day and age | Today, presently                                |
| Name of the game    | The heart of the matter, the true purpose       |
| Off the record      | To speak confidentially                         |
| State of the art    | Best                                            |

**BE CONCISE**

- Avoid wordy expressions.

| TOO MANY WORDS                                  | FEWER WORDS |
|-------------------------------------------------|-------------|
| Prior to the event                              | Before      |
| At this point in time                           | Now         |
| Subsequent to                                   | After       |
| For the purpose of                              | To          |
| In the event that                               | If          |
| In view of the fact that / Due to the fact that | Because of  |
| Until such time as                              | Until       |

- Avoid unnecessary repetition.

**Examples: Repetition (Tautology)**

~~“Absolutely essential”~~  
~~“Advance planning”~~  
~~“Close scrutiny”~~  
~~“Combine together”~~  
~~“Completely empty/full”~~  
~~“Exactly identical”~~  
~~“My personal opinion”~~

- Include only relevant information.
- Come to the point quickly and without “waffle”.
- Omit unnecessary background information.
- Use short, familiar words instead of long words.

| LONG      | SHORT         |
|-----------|---------------|
| Utilise   | Use           |
| Commence  | Begin / Start |
| Terminate | End           |

- Keep sentences short and simple – 17 words or less. However, vary the sentence length or structure to avoid monotony and create interest.

| TOO LONG                                                                                                                                                                 | SHORTER                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|
| In this letter we have attempted to answer all of your questions, and we hope that if you have any additional questions whatsoever, you will not hesitate to contact us. | If you have additional questions, please call us. |

- Revise your first draft, looking for ways to reduce the number of words or to cut out unnecessary information.

**BE COMPLETE**

- Check that all the information the reader will need is included:  
Who? What? Where? When? Why? How?

**BE CORRECT**

- Check your work for accuracy of punctuation, grammar and spelling (especially the names of people and places).

| INCORRECT                              | CORRECT                              |
|----------------------------------------|--------------------------------------|
| He done it.                            | He did it.                           |
| She brung it.                          | She brought it.                      |
| He could of done it.                   | He could have done it.               |
| She practices typing.                  | She practises typing.                |
| He hanged the certificate on the wall. | He hung the certificate on the wall. |
| She loaned it to him.                  | She lent it to him.                  |
| These items compliment each other.     | These items complement each other.   |
| How much further is it?                | How much farther is it?              |
| He is the best of the two.             | He is the better of the two.         |
| It's colour has faded.                 | Its colour has faded.                |

- Do not rely on the computer “spell check” function to pick up all spelling errors. It won't detect the mistake if it has been written as another acceptable word (e.g. “no/on”, “to/too”, “then/than”, “quite/quiet”, “lose/loose”), or if a word has been omitted and the sentence still makes sense.
- Check for accuracy of information: e.g. times, dates, figures and telephone numbers.
- Check for consistency of layout.

**BE CONCRETE**

- Give specific details.

| ABSTRACT                                                     | CONCRETE                                                                                                   |
|--------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Your study package will be delivered soon.                   | Your study package will be delivered in two weeks' time.                                                   |
| Your superannuation plan will earn high interest.            | Your superannuation plan will earn 10% interest.                                                           |
| Photocopiers should have appropriate performance parameters. | Photocopiers should be able to produce 50 stapled copies of 20 double-sided sheets in less than 3 minutes. |

- Try to substitute exact facts or figures for vague generalities.
- Use concrete examples to clearly illustrate the point you are making.

**BE CONVINCING**

- Use language that is believable.
- Avoid exaggeration and superlatives.
- Suggest possibilities or probabilities rather than making forceful assertions.

| EMPHATIC                | REALISTIC         |
|-------------------------|-------------------|
| Always                  | Usually           |
| Never                   | Rarely            |
| Everyone/everything/all | Most              |
| No-one, nobody          | A few, some       |
| Must, should, will      | Could, might, may |

- Whenever possible, use active voice to let the subject perform the action.

| PASSIVE                                                      | ACTIVE                                               |
|--------------------------------------------------------------|------------------------------------------------------|
| Record enrolments were received by the University this year. | The University received record enrolments this year. |
| The report was completed by Sue.                             | Sue completed the report.                            |

- Provide supporting arguments for your point of view – e.g. provide examples, statistics or a quote from a respected authority.

### BE COURTEOUS

- Display good manners and a caring attitude in your writing.
- Whenever possible, phrase your writing positively with a pleasant tone.

| NEGATIVE                                                                                                 | POSITIVE                                                                                                                             |
|----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| We cannot deliver your study package before 1 <sup>st</sup> March.                                       | Your study package will be delivered as soon as possible after 1 <sup>st</sup> March.                                                |
| We cannot agree to the present terms and conditions outlined in your contract.                           | Some discussion regarding the terms and conditions will need to be entered into before we can reach a mutually satisfying agreement. |
| You failed to enclose a cheque with your order; therefore, it is impossible to send you the merchandise. | As soon as your cheque arrives, we'll send your order through express delivery.                                                      |

- Write tactfully with the reader firmly in mind. A tactful writer does not offend, is not sexist or insulting, and is never condescending

| SEXIST          | GENDER NEUTRAL               |
|-----------------|------------------------------|
| Spokesman       | Spokesperson, representative |
| Manpower        | Staff, workforce             |
| Chairman        | Chair, Chairperson           |
| Man the counter | Staff the counter, serve     |

### Examples: Condescension

"Of course, as *anybody would know*, ..."

"*With respect*, what you said is ..."

"*Obviously*, the situation is ..."

- Passive voice should be used when communicating bad news. This avoids negative overtones and personal criticism.

| ACTIVE                                                                          | PASSIVE                                                                  |
|---------------------------------------------------------------------------------|--------------------------------------------------------------------------|
| John Smith gave an inaccurate report about the University's plans to the media. | An inaccurate report about the University's plans appeared in the media. |
| John made three mistakes in the report.                                         | Three mistakes were made in the report.                                  |

- Use language that is rational and unemotional.

## Using Bullet Points

### Why?

- Communicates your message in a succinct and clear manner
- Quick and easy to both read and write
- Highlights the most important information.

### Rules for using bullet points

Write in complete sentences or part sentences as required, be consistent. Use a consistent type of bullet or symbol remembering fancy symbols may take away from your message.

### Full stops or not?

Bullet points are often incorporated into a sentence structure, generally preceded by :. If this is the case, there are no capital letters on each line and the full stop goes at the end.

Example:

All supervisors will need to review their staff's performance in the following areas:

- Planning
- Interpersonal relationships
- Communication
- Meetings
- Conflict management.

If bullet points are used without a lead in, they have a capital letter at the start of each line and a full stop at the end as in the sections Why and Rules for using bullet points above.

These rules apply to all uses of bullet points. They are a very useful way of listing important information.

## Policy and Procedure Writing

CSU has comprehensive Guidelines for the preparation of Policies, Procedures, Guidelines and Forms in the Administration Manual:

[http://www.csu.edu.au/adminman/misc/guidelines\\_for\\_preparation\\_of\\_policies.doc](http://www.csu.edu.au/adminman/misc/guidelines_for_preparation_of_policies.doc)

## COMMON BUSINESS REPORTING LANGUAGE

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Common CSU business language includes those frequently used words and abbreviations in CSU reports, websites and other documents distributed both internally and externally. Some common terms can be found on the Media Website:

[http://www.csu.edu.au/division/marketing/secure/csunonly/media\\_spelling.htm](http://www.csu.edu.au/division/marketing/secure/csunonly/media_spelling.htm)

The definition of common business language is those words that are used throughout our business documents to communicate a common message and strategic direction for the Organisation. Some of these words relevant to CSU are contained in the Business Reporting Language Glossary on the Work Process Improvement website (*in development*).

The following is information from the Australian Government Department of Finance and Deregulation. They have identified the benefits of adopting common business language below.

For information to be shared successfully, it should be documented in a way that allows users to:

- understand its meaning;
- accept its format; and
- have confidence in its quality.

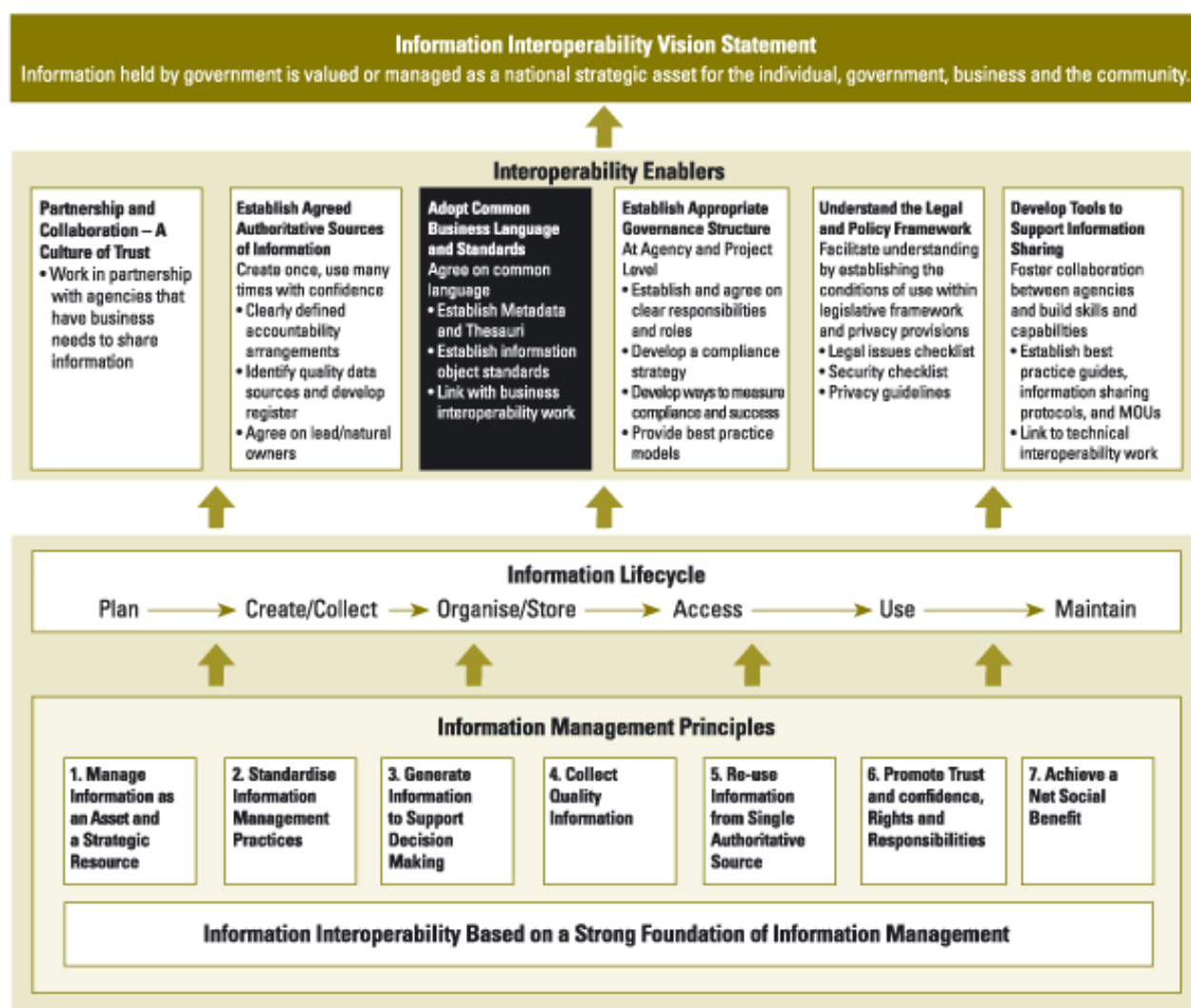
Agencies should adopt standard definitions and formats for information objects that they commonly share with other agencies. They need to use a common language and standardised approach to information exchange. This will:

- promote information sharing;
- reduce costs and confusion;
- reduce the risk of information misuse; and
- improve the readiness of agencies to exchange and share information.

Standards may be established in a number of ways. They may be:

- endorsed by a recognised standard setting authority;
- enacted by legislation;
- agreed voluntarily; or
- established through protocols and common practice.

Source: Australian Government Information Interoperability Framework retrieved September 2008 from <http://www.finance.gov.au/publications/australian-government-information-interoperability-framework/common-business-language.html>



Source: Australian Government Information Interoperability Framework retrieved September 2008 from <http://www.finance.gov.au/publications/australian-government-information-interoperability-framework/common-business-language.html>

## EFFECTIVE EMAILS

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Emails are one of the most important business communication tools we have today. There are many issues regarding computer security and email security. There are the issues of personal security, company liability and viruses to name a few. In the workplace, the email system is meant for business use, but most companies allow for some private use of email. You need to be aware of your company's email policy. See CSU Charter for Electronic Messaging: <http://www.csu.edu.au/division/dit/about/emessaging.htm>, as well as the CSU Policy for the Use of Computing and Communication Facilities: <http://www.csu.edu.au/adminman/tec/PER12.rtf>.



### Exercise – Email Best Practice Guidelines

**Appendix 1** is a copy of CSU's Email Guidelines for Best Practice available in the Administration Manual:

<http://www.csu.edu.au/adminman/tec/CSUEmailGuidelinesJuly2008.pdf>

After reading the guidelines answer the following questions:

Is it best practice to send an attachment or include a hyperlink in the text of the email?

---

Should I send both the Executive Director and his/her Admin Assistant an email?

---

Are emails subject to the same retention and disposal requirements as electronic and paper-based records?

---

What is the best way to save emails?

---

Name 3 other methods you could use to communicate your message to CSU?

1.

---

2.

---

3.

---

## Emoticons and Netiquette

CSU Student Services have information on the use of emoticons and "netiquette". "Netiquette" is network etiquette; the do's and don'ts of online communication. Netiquette covers both common courtesy online and the informal "rules of the road" of cyberspace.

Netiquette is explored on the CSU Student Services website:

<http://www.csu.edu.au/division/studserv/online/faqs/netiquette/emoticons.htm>

The core rules of Netiquette are explained in more detail on the following website:

<http://www.albion.com/netiquette/corerules.html>

Even though email is quick and easy to use, sometimes another form of communication might be more suitable. Think about your message and the purpose it is meant to achieve. If a phone call would be better, don't use email. It would be better to think of an alternative to email when:

- your message is personal or confidential
- the news you have to give is bad. It is easy to sound unconcerned when you deliver unpleasant news by email
- you are worried that your message might not be clearly understood
- you need an immediate response
- Language barriers and time difficulties may also be factors you need to consider.

When writing business emails a professional yet conversational tone is the most effective. Imagine you are attending a function attended by your colleagues and supervisors. In this situation you would need to be polite, positive and friendly. At the same time you need to be professional. Also you need to consider who you are speaking to and their position and level in the organisation. Email communication is similar but with an important exception, your communication is electronically transmitted so it can be passed on to anyone within or external to the organisation.

**Based on:** Royal Melbourne Institute of Technology (RMIT) (2008): *Writing Skills for Business* online training:  
[http://www.dlswweb.rmit.edu.au/lsu/content/4\\_WritingSkills/writing\\_tuts/business\\_%20english\\_LL/index.html](http://www.dlswweb.rmit.edu.au/lsu/content/4_WritingSkills/writing_tuts/business_%20english_LL/index.html)

## 10 tips for effective emails

1. **Think** before you write. Plan your message.
2. **Use the subject line** to capture your reader's attention.
3. **Keep your message short and clear.** Remember that the screen shows only about half of what you see on hard copy.
4. If your message is long, give a **summary** at the start.
5. **You are accountable for what you write.** Always write your message as if your boss were going to read it.
6. **Do not send angry messages.** Take a few minutes to cool down before you start your email.
7. **Don't type your message in capitals.** Capitals are considered to be SHOUTING and are rude.
8. **Respect common grammar & spelling conventions.** Don't type your entire message in lower case, and run a spell / grammar check over the message.
9. Send messages only to people who need to read them. **Respect other people's time** and don't forward junk email to them. Use CC: and BCC: sparingly.
10. **Proofread your message** before sending it. You should always reread your message before you send it and correct any mistakes.

Source: Royal Melbourne Institute of Technology (RMIT) (2008): *Writing Skills for Business* online training.

## Legal risks of emails

There have been legal cases regarding the use of email where a company has been found guilty of libel over email content. Email is a business tool and users are expected to use it in a responsible, effective and lawful manner.

Keep legal and Equal opportunity regulations in mind by visiting the EEO website <http://www.csu.edu.au/division/humres/services/sd/equal/legislation.htm>, privacy legislation on the Legal Website [http://www.csu.edu.au/division/vcoffice/ovc/legal\\_foi.htm#4](http://www.csu.edu.au/division/vcoffice/ovc/legal_foi.htm#4) and by being aware of the CSU Web Policy: <http://www.csu.edu.au/adminman/tec/TEC05.rtf>.

You need to be careful that you do not send emails that offend another person. Listed below are some items that outline the legal risks of email:

- if you send emails with any libellous, defamatory, offensive, racist or obscene remarks, you and your company can be held liable
- if you forward emails with libellous, defamatory, offensive, racist or obscene remarks, you and your company can be held liable
- if you unlawfully forward confidential information, you and your company can be held liable
- if you unlawfully forward or copy messages without permission, you and your company can be held liable for copyright infringement
- if you send an attachment that has a virus, you and your company can be held liable.
- it is strictly forbidden to send or forward emails that contain libelous, defamatory, offensive, racist or obscene remarks. If you receive an email like this, or are the subject of an email like this, you must immediately notify your supervisor.
- You must have permission from the sender to forward an email to another person .
- do not forge or attempt to forge email messages.
- do not disguise or attempt to hide your identity when sending email.
- do not send email messages from someone else's account
- do not copy a message or an attachment belonging to another person without the permission of the originator.

Source: Royal Melbourne Institute of Technology (RMIT) (2008): *Writing Skills for Business online training*.

## REVIEWING AND PROOFREADING: CSU STYLES AND STANDARDS

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It is essential to review and proofread your document before printing, distributing or publishing to ensure quality. Go back over your initial outline and requirements to ensure you have covered all information required and answered all questions asked by your audience. Perhaps the most tragic mistake any manager could make is to fail to proofread his correspondence properly - one spelling error can do irreparable harm to your credibility. Your name is on the document and therefore you are the one to be held responsible for its content. Ensure all parts of your document are in the correct format and properly written, that there are no errors in punctuation, vocabulary, spelling, or grammar. If there is a template required or available ensure your content has been transcribed correctly. Make sure that others material is properly referenced throughout and in the final bibliography.

While still in draft stage, all editing changes should be completed in MS Word using tracking feature so changes can be seen or "second read" by other CSU staff prior to sign off.

In the CSU Media Office the standard for editing guidelines for CSU material is based on the Style Manual for authors, editors and printers, Australian Government Printing Service, Canberra, sixth edition, 2002. The Macquarie Dictionary (Australian National Dictionary, Revised Third Edition) is the reference dictionary of choice. Correct official nomenclature and spelling in reference to campuses, facilities, position titles and third parties can be seen on the media website: [http://www.csu.edu.au/division/marketing/secure/csually/media\\_spelling.htm](http://www.csu.edu.au/division/marketing/secure/csually/media_spelling.htm)

CSU media office has guidelines for special terms:

- When Campus is used to officially name that campus, eg., Bathurst Campus, Campus starts with a capital C.
- Senior staff positions take capitals: Executive Director, Head of Campus, Director of Research Centre, Pro Vice-Chancellor, Deputy Vice-Chancellor, Vice-Chancellor; Chancellor.
- Vice-Chancellor takes a hyphen, as do Pro Vice-Chancellor and Deputy Vice-Chancellor;
- "University", when referring to Charles Sturt University, should be a capital U.

The Media website has further resources to help during the editing phase including a glossary of terms and a Quick spelling guide:

[http://www.csu.edu.au/division/marketing/secure/csually/media\\_spelling.htm](http://www.csu.edu.au/division/marketing/secure/csually/media_spelling.htm)

### Editing and revising your document

The final step in ensuring professional writing is to edit and revise your copy to maintain consistency and quality. Make sure you read over carefully and remove any unnecessary conjunctions (and, but, etc). Remove unnecessary words - words that do not add to your main point(s), and remove unnecessary punctuation (eg, commas). Editing involves second reading your document to check for completeness, conciseness, clarity, tone, accuracy and effectiveness. The document can then be improved upon by re-writing sections, and adding or deleting text where required.

Have someone else read your work and ask them to either highlight suggestions in red pen if in hard copy and/or use the track changes option in a word-doc soft copy.



## Quick tips to help in editing your writing

|                                                                     |                                                                                                                                                                      |
|---------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Read through the whole document to check for logic and order</b> | Does the opening paragraph set the background or purpose for the correspondence?                                                                                     |
|                                                                     | Is the information set out in a logical order?                                                                                                                       |
|                                                                     | Is all the necessary information included?                                                                                                                           |
|                                                                     | Is any information unnecessary? Should this information be in a separate attachment or enclosure instead?                                                            |
|                                                                     | Have linking or transition words been used to show connections between ideas?                                                                                        |
|                                                                     | Is the action you want from the reader clear?                                                                                                                        |
| <b>Now you're ready to look at your writing style</b>               | Have you used the "you" approach as appropriate?                                                                                                                     |
|                                                                     | Could any words, phrases or sentences be replaced by shorter ones?                                                                                                   |
|                                                                     | Could some information be set out in a list using bullet points?                                                                                                     |
|                                                                     | Is there one main idea per paragraph?                                                                                                                                |
|                                                                     | Could any paragraphs be further subdivided?                                                                                                                          |
|                                                                     | Is there enough white space in the document?                                                                                                                         |
|                                                                     | Have you used specific language to say what you mean?                                                                                                                |
|                                                                     | Have you used the right level of language for your reader?                                                                                                           |
|                                                                     | Have you avoided using clichés, tautologies, pompous expressions, and unnecessary jargon in your document?                                                           |
| <b>So let's prepare to write your second draft.</b>                 | Have you used a positive and friendly tone?                                                                                                                          |
|                                                                     | Have you personalised your writing as appropriate to your reader and the type of writing?                                                                            |
| <b>Now you can start to proofread. Let's begin with grammar.</b>    | Once you have finished, review all the points above to check you are satisfied with what you have written.                                                           |
|                                                                     | Run your computer grammar check if you have one.                                                                                                                     |
|                                                                     | Read each sentence aloud. Check that it sounds right.                                                                                                                |
|                                                                     | Check for any particular errors you know you often make.                                                                                                             |
| <b>Let's now proofread for punctuation.</b>                         | Check that you have not used any incorrect words.                                                                                                                    |
|                                                                     | Are your capitals correct?                                                                                                                                           |
|                                                                     | Are your sentences complete?                                                                                                                                         |
|                                                                     | Are there sufficient commas to avoid ambiguity?                                                                                                                      |
|                                                                     | Are your lists punctuated?                                                                                                                                           |
| <b>It's time to check your spelling.</b>                            | Are your numbers presented in the correct format?                                                                                                                    |
|                                                                     | Run your computer spell check program if you have one.                                                                                                               |
|                                                                     | Read your words one at a time. If it is at all possible, ask someone to read through your document and check your spelling as well as other points for proofreading. |
| <b>Finally, check your layout</b>                                   | Focus particularly on words you frequently misspell.                                                                                                                 |
|                                                                     | If you have headings or sub-headings in your document, are they consistently presented?                                                                              |
|                                                                     | Have you used the correct format for the type of correspondence you have written?                                                                                    |
|                                                                     | Have you addressed your reader in the appropriate manner?                                                                                                            |
|                                                                     | Does it look attractive and readable?                                                                                                                                |

Based on: Flanagan, S. (2007), *Business Writing Skills*. CSU Organisational Development. Page 37 & 38

**Important things to remember when editing:**

**Complete**

1. Does the message say all I want it to say?
2. Does it answer all the questions the reader may ask?

**Concise**

3. Has unnecessary information been removed?
4. Is it expressed in the fewest words necessary for completeness,

**Clear**

5. Will the reader understand the wording?
6. Is the intended meaning clear?
7. Is each paragraph one complete thought?
8. Are the ideas presented in the most effective order?
9. Do sentences and paragraphs flow logically?
10. Is the desired reader action specific?

**Correct**

11. Are the statements true and accurate?
12. Have I distorted any of the facts?
13. Is the information (e.g. data, statistics) accurate?
14. Is the grammar correct?
15. Is the spelling correct?
16. Is the punctuation correct?

**Appropriate in tone**

17. Will the tone get the desired response?
18. Is it free from antagonistic words or phrases?
19. Is it free from hackneyed or stilted phrases which will amuse or irritate the reader?
20. Is the language positive?
21. Is the language gender-neutral?
22. Is the tone conversational?
23. Is the correct approach (direct, indirect) being used?
24. Is the tone varied and readable, or flat and monotonous?

**Neat**

25. Is the layout correct?
26. Is the layout pleasing to the eye?
27. Are there noticeable corrections?

**Sources:** "Checklist for Written Communication", source unknown.

Moore, R. 1994, *High-Impact Business Writing* (video workbook), CareerTrack, Boulder, Colorado, p. 47.

## Proofreaders' Marks

|                                                                                   |                                                              |                                                                         |
|-----------------------------------------------------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------------------|
|  | Delete the word or line                                      | Delete the word <del>computer</del> .                                   |
| /                                                                                 | Strike through the misstroke; write the correct letter above | Observe good rol <sup>e</sup> models.                                   |
| #<br>^                                                                            | Insert a space                                               | The words ran <sup>#</sup> together.                                    |
| ⌋                                                                                 | Close up the space                                           | Mar <sup>⌋</sup> keting goals were m <sup>⌋</sup> et.                   |
| ↷                                                                                 | Transpose the word or letter                                 | Was <sup>date</sup> the postp <sup>de</sup> ?                           |
| ⊙ ↗ ↘                                                                             | Insert punctuation                                           | She left for the meeting⊙                                               |
| ^                                                                                 | Insert a word(s)                                             | Her training <sup>was</sup> <sub>^</sub> excellent.                     |
| ≡                                                                                 | Capitalize                                                   | <u>c</u> indy discussed her goals with <u>d</u> ebra and <u>h</u> elen. |
| lc                                                                                | Put in lowercase letters                                     | Submit your application for the <sub>lc</sub> Spring conference.        |
| ¶                                                                                 | Start a new paragraph                                        | ¶ We provide these services.                                            |
| NO ¶                                                                              | Remove the paragraph indent                                  | NO ¶ The information was accurate.                                      |
| ○                                                                                 | Spell out                                                    | The <sup>③</sup> new members were present.                              |
| SS[                                                                               | Single-space                                                 | SS[ Plan to order additional<br>equipment for the office.               |
| DS[                                                                               | Double-space                                                 | DS[ We will hire two new staff<br>members for accounting.               |
|                                                                                   | Align vertically                                             | TO: Patricia A. Ward<br>FROM: Dr. S. Kramer                             |
| ...                                                                               | Stet (leave copy as it was originally)                       | <del>Sales</del> <sup>✓</sup> results were late.                        |

Source: Smith, D. & Sutton, H. 1994, *Powerful Proofreading Skills*, Crisp, Menlo Park, California, p. 19.



## Workplace Learning Activity – RMIT Writing tips interactive exercise

Q. Take some time to complete the online exercises on Writing tips on the RMIT website: [http://www.dlsweb.rmit.edu.au/lisu/content/4\\_WritingSkills/writing\\_tuts/business\\_%20english\\_LL/tips/index.html](http://www.dlsweb.rmit.edu.au/lisu/content/4_WritingSkills/writing_tuts/business_%20english_LL/tips/index.html) . Take note of areas you may need to pay special attention to or to increase your skills in. There are further resources and readings listed at the end of this module.

Notes:

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### Seven layout mistakes to avoid

Seven common layout mistakes in documents, web pages and PowerPoint slides. Avoid these mistakes and you'll produce more professional documents.

#### 1. Don't just fill up space

Just like you need darkness to appreciate light, you need white space to make your documents more legible. You don't have to fill up every square centimetre with text or images: less IS more. Increasing the margins of your typical A4 document by 2cm will often improve the layout greatly. Being aware of white space takes practice. The next time you come across a nice layout, make a point to notice just how much white space is used.

#### 2. Beware of stuff overload

Volume does not equal quality. So edit ferociously to keep your content tight. Refrain from gratuitous decorations. As a general rule, use at most two typefaces and no more than three different heading sizes. Avoid colours and images unless they are pertinent to your material. Remember, your intention is not to show off the weirdest typefaces you have, or the vastness of your clipart collection.

#### 3. Don't overuse symmetry

Using centring and symmetrically arranged elements tends to create boring layouts. If you have a column of text and a column of images, make their widths obviously different. Left-justified headings are neater and easier to read than centred headings. On some web pages, centred headings can become disconnected from their body copy. Unless you are working in a right-to-left language, don't right-justify any body copy. On web pages, right-justified text can be invisible on smaller screens.

#### 4. Pay attention to detail

Many documents are marred by unintended changes in typeface or type sizes. Use document styles, instead of manual spot formatting, to reduce the likelihood of this. Other layout mistakes to watch are: heading sizes, margins and "orphans and widows" (single lines of text at the top or bottom of a new page). Also, use your spell checker!

#### 5. Avoid unclear hierarchy

Documents are generally consumed in a linear fashion, so set up a clear hierarchy of reading. Put the most important information first. Use different heading sizes to differentiate between sections and subsections. Not everything is equally important. Many ineffective websites are filled edge to edge with minimally prioritised material. Do not put your logo on every page or every slide. Your logo should not be a space filler. If your message is useful or interesting, people will remember you.

#### 6. A word processor is not a typewriter

Unless you work in a mono spaced typewriter font like Courier, hitting space twice after punctuation creates ugly gaps in your paragraphs. It also screws up the Full Justification algorithm. Use Paragraph Styles to specify the gap between your paragraphs, instead of hitting Enter twice. Each stroke of the Enter key adds an unnecessary Paragraph Mark to your document. Don't use spaces to line up bits of text that should be in a table. A space is used to separate words and nothing else.

#### 7. Multimedia is annoying!

Just because you can, does not mean you should. When used inappropriately, animations, videos and sound all scream "Amateur". And they are usually poor quality, to boot. Common examples are websites that unexpectedly play sound, PowerPoint presentations with a spinning logo on every page and Word documents that use those blinking fairy-sprinkles Text Effects. Keep it simple. When in doubt, don't format anything! The styles in the various default MS Office templates do tend to produce good results. The result will be documents that are easier to read, transfer between computers, share, upload to information systems and integrate into workflows.

Source: Liew, Z, *Flying Solo: Seven Layout Mistakes to Avoid* (2008). [http://www.flyingsolo.com.au/p266968171\\_Seven-layout-mistakes-to-avoid.html](http://www.flyingsolo.com.au/p266968171_Seven-layout-mistakes-to-avoid.html)

### **Making your documents attractive**

Avoid dull or monotonous language and make sure your first paragraph grabs the readers attention inciting them to read the second, third and even last section. Try to use positive and affirmative language and make sure the focus is on the recipient's needs, interests, or purposes and not purely your own.

Increase the probability of holding your readers attention by ensuring you use the proper materials such as templates, binders and folders. Printers should have clean black ribbons, and all outgoing correspondence should be drafted on the company's letterhead clear of smudges or errors. Don't overcrowd or add text just to fill in the page, the use of white space can be helpful to define important topics.

Whenever possible, reproduce your business documents in colour. The added impact will be well worth the extra expense involved. Keep in mind at all times that your documents must exhibit the upmost professionalism.

*"There can be at best only a few helpful suggestions to help you formulate effective written communication skills that when applied can help make the process simpler and more efficient. It takes years of practice and experience to overcome the obstacles, but through patience and perseverance you will eventually find the process a natural extension of your personal communication skills."*

Source: Smith,W A & Kleiner,B H, *How to improve business writing skills* Managerial Auditing Journal (1995). P6.

**PART 2: REPORT WRITING****REPORT WRITING: PURPOSE, PLANNING & STRUCTURE****What is a report?**

A report is a structured written document in which a specific issue is examined for the purpose of conveying information, in order to report findings, to answer a request, to put forward ideas and make recommendations or offer solutions.

An effective report is one that is written appropriate to its purpose and audience, accurate, logical; clear and concise; and is well organised into clear section headings. These sections enable readers to find and focus on specific pieces of information.

**Purpose, audience and types of Reports**

Keep in mind what your audience needs to know, this will dictate what type of report you will need to write and the amount of detail to be contained therein. Some questions you need to keep in mind include:

- Who is the report written for?
- How is it relevant to them?
- Why has the report been written?
- Why should they read the report?
- What will the audience do with the information?
- What are the topics covered?
- What are the recommendations or outcomes?

It is most important to think about your reader(s) in terms of their wants, needs and expectations. The level of knowledge they have on the topic and their individual areas of expertise could impact greatly on how your report is received.

It's always important to make a note on the report itself which outlines who the report was prepared for. If it is not possible to narrow your focus, and you are required to write a report that is accessible for differing audiences, it may be appropriate to write several different versions of the same report.

**What type of report am I writing?**

**Objective reports:** The primary purpose of an objective report is to present both sides of an argument in a balanced non-biased way. **Persuasive reports** are usually quite one sided: stressing the benefits of one side of the argument and the pitfalls of the other. For this reason, persuasive reports are structured quite differently.

Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 8

**Workplace Learning Activity – Student Services Learning Guides**

Q. Various report and writing tips for students (and staff) are found on the student services learning skills website: <http://www.csu.edu.au/division/studserv/learning/>. When you get back to your office take some time to read through and refresh your skills. Consider using the resources on the site for group work or discussions at your next team meeting or in-service.

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**Planning your report**

|                            |                                                                                                                                                                                                            |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Defining the purpose    | <ul style="list-style-type: none"><li>- read the brief carefully</li><li>- identify key words</li><li>- make sure you know what's really being asked</li></ul>                                             |
| 2. Defining the audience   | <ul style="list-style-type: none"><li>- determine your audience's level of understanding</li><li>- determine what your audience needs to know</li></ul>                                                    |
| 3. Establishing parameters | <ul style="list-style-type: none"><li>- determine the scope and level of detail required</li><li>- determine the length of the report and what can be covered in that length</li></ul>                     |
| 4. Gathering information   | <ul style="list-style-type: none"><li>- make sure the information you gather is relevant, contemporary and factually correct</li><li>- make sure that you transcribe facts and figures correctly</li></ul> |

Source: Curtin University: *Study Skills on Report Writing*: <http://startup.curtin.edu.au/study/writing/report.cfm>

**Research the topic**

In order to produce a high quality report, it is essential to include accurate, relevant and up to date information collected from a wide variety of sources. Examples of where to collect information include: interviews or discussions with experts, surveys, observations, a compilation of statistics and company or industry data – this is called primary data. You may also find secondary data in books, theses, on the Internet, in journals or newspapers, reports, conference papers, brochures etc.

Report writers also consult secondary sources in order to get ideas for writing a report. It is always useful to not only consult sources but also refer to them directly in the body of the report.

Why would a report writer refer to secondary resources in their report? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 8

## Create the outline

To begin an outline, start by jotting down a list of topics that you know you need to cover. break the topics down into subsets

When creating an outline:

1. allow chaos to reign
2. give structure to your brainstorming by deciding on the topics you wish to cover
3. create sub topics under your main headings
4. arrange the topics and sub topics in a logical order
5. add appropriate introductions and conclusions to your structure
6. you may wish to circulate your outline for feedback at this stage.

The next step is to arrange the headings into a logical sequence. It may help to follow an argument development method:

| Argument development method | Approach                                                                                                                     |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------|
| Chronological               | From one point in time until another                                                                                         |
| Inductive                   | From the particular to the general                                                                                           |
| Deductive                   | From the general to the particular                                                                                           |
| Geographical                | From one area/campus/section/state/country to another                                                                        |
| Topical                     | From one subject or item of discussion to the next                                                                           |
| Problem/solution            | The problem is...solutions/options are...the outcome will be...or the problem was...the action taken was...the result was... |
| Pros/cons                   | Advantages are...disadvantages are...                                                                                        |
| 5 Ws 1 H                    | Explanation of what, where, when, why, who, how                                                                              |
| Ideal/reality               | What our current reality is...what our vision is...a                                                                         |

### Write the draft

Once you have created an outline, the next step is to create a draft. It is important not to worry too much about details such as punctuation and spelling at this point. The most important thing is to establish a logical flow and ensure you have enough evidence to support the ideas you are presenting. For each section and sub-section ensure you lead with a summary sentence that immediately flags to the reader what the main idea of the section is.

Impartiality is imperative in the drafting stage. As the researcher and writer you must express your ideas in an objective manner. This is why report writers often express themselves in the third person. For example, they may write: The research reflected...rather than: Our research reflected.

Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 11



## Reading – Division of Library Services Guidelines on Monthly Quarterly and Annual Reports

The CSU Division of Library Services have developed Guidelines on Monthly Quarterly and Annual Reports. See *Appendix 6*. Read through this document thoroughly before continuing on with this section.

## Types of Reports

There are numerous types of reports that are widely used in business. These range from short informal or semi-formal reports to longer formal reports. The format is determined by the purpose of the report, the amount of detail required, and the audience for whom it is intended.

### 1. SHORT INFORMAL / SEMI-FORMAL REPORT

The short report is generally less than four pages or 1200 words in length. It has fewer parts than a longer report and may use headings to guide the reader through the ideas being presented in the body of the text. Because the report is written in an informal or semi-formal style, first person and active voice are preferred (e.g. “I consider that ...” rather than “It is considered that ...”).

Structure:

- Title
- Introductory statement – what the report is about and why it is being written
- Body of the report – findings and discussion
- Conclusions and recommendations

Other formats may also be used for short reports. For example:

#### *Pre-Printed Report Form*

A report form usually consists of questions to gain specific information that can be stored manually and/or entered onto a computer.

#### *Letter Report*

If a short report is written for a reader outside the organisation in which it was written, it may be written as a letter report. This report is usually written in the first person and active voice (e.g. “I consider that ...” rather than “It is considered that ...”) and is more informal than a long report.

A letter report shares certain features with normal letters – features that would not normally be found in a report: it is written on letterhead and includes the address of the reader, salutation (Dear ...), close (Yours Sincerely/faithfully) and signature.

On the other hand, a letter report is more structured than a normal letter. It has a subject line, which is sometimes seen in letters, and an introduction and conclusion which are similar to those of a letter in that neither is prefaced by a heading. The body of the letter, however, is in report format, with headings and sub-headings clearly defining the sections and sub-sections.

#### *Memo Report*

A memo report may be written to a reader who works in the same organisation as the writer. Because the writer is likely to know something about the reader and his/her requirements and level of knowledge of the subject matter, the memo report does not need to contain detailed background information about all of the things to which it refers.

This report is written on memo paper and follows the memo format. However, it is longer than the conventional memo (two pages or more) and is therefore divided into separate, labelled sections. The memo report is usually written in the first person and active voice (e.g. “I consider that ...” rather than “It is considered that ...”) and is more informal than a letter report.

## 2. LONGER INFORMAL / SEMI-FORMAL REPORT

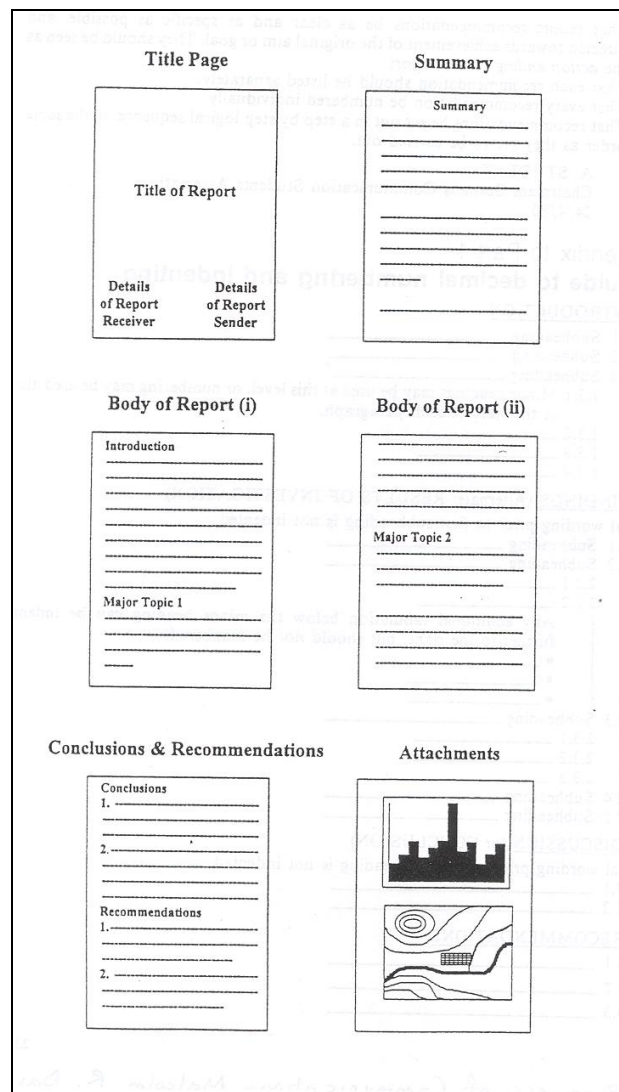
Longer informal or semi-formal reports contain more information and deal with the material in much greater detail than short informal reports.

The longer report is more structured and has more sections than the short report. Headings and sub-headings are used to guide the reader through the sections and sub-sections. Because it is informal or semi-formal, first person and active voice are preferred.

Structure:

- Title page
- Summary
- Introduction
- Body of the report - findings and discussion
- Conclusions and recommendations
- Appendices (if applicable)

### Layout of an Informal Report



### 3. FORMAL REPORT

Formal reports are rarely less than ten pages long and can often run into hundreds of pages. They are commonly written for a large audience who do not know the writer, and are sent outside an organisation. Third person and passive voice should be used (e.g. “It is considered that ...” rather than “I consider that ...”).

#### Structure:

- Cover letter/memorandum
- Cover
- Title page
- Summary
- Table of contents
- Table of illustrations, figures, tables, etc. (if applicable)
- Introduction
- Body of the report – methodology, findings and discussion
- Conclusions
- Recommendations
- Bibliography
- Appendices (if applicable)
- Glossary or list of abbreviations (if applicable)
- Index (optional)

#### Cover Letter/Memorandum

- Write a cover letter if the report is to be sent to a reader outside the organisation.
- Write a cover memo if the report is to be sent to a reader inside the organisation.
- The letter/memo should contain a salutation (“Dear ...” for a letter), statement of purpose (“Here is the report on ... that you requested”), a brief overview or summary (“In this report you will find ...”), acknowledgements (“Several people proved to be of great assistance to me...”), and a courteous close (“Thank you for the opportunity to investigate ... If you have any questions about the report, please contact me”).

#### Cover

- A report may be bound into a folder or professionally produced as a book.
- The cover should be attractive.
- The report title should be on the cover and spine.

#### Title

- The title should be complete and comprehensive, without being so long that it is difficult to grasp.

E.g. “Report on the Proposed Realignment of CSU’s Division of Human Resources 2008”

#### Title Page

- Title of the report.
- Name and position of the person who wrote the report.
- Name of the person (or organisation) for whom the report was written.
- An alternative to having a separate title page is to set out this information at the top of the first page.

#### Summary

- The summary is a quick overview of the aim, conclusions and most important aspects of the report.
- The summary is designed to be read by people who are too busy to read the whole report. It is therefore essential that it be brief, comprehensive and interesting.
- The summary is usually written last.

#### Table of Contents

- The table of contents is a systematic list, in page order, of all the parts of a report.

- Page numbers are listed next to each heading and sub-heading.
- If desired, a numbering system may be used for organising the table of contents and report:

**Table of Illustrations, Figures, Tables, etc. (if applicable)**

- Include separate tables of illustrations, figures (i.e. graphs and diagrams) and/or tables if the report is four or more pages long and contains a number of graphics, figures or tables.

**Introduction**

- The introduction is the beginning of the major part of the report. Its aim is to provide all the necessary information so that the reader can understand the main discussion and the body of the report.
- It is the place for a broad, general view of your material. Avoid details that belong properly to the body of the report or the appendices.
- Authorisation or terms of reference:  
What is the problem or issue being reported on?  
Who asked for the report?
- Purpose:  
Why is the report being written?
- Background information:  
What was the sequence of past events leading to the present problem or issue?
- Scope:  
What aspects of the topic will be dealt with? What will be excluded?  
What kind of information will be presented?
- Definitions of technical terms and words that you intend to use in a special sense.

**Methodology**

- Outline the method of investigation or research:  
When and how was the information obtained?
- Outline the sources of information:  
Where was the information obtained?

**Findings**

- Present the facts and results that were obtained through the investigation or research.
- Restrict the content of this section to factual information of high credibility. Opinions should be located in the discussion section of the report.
- Divide the section into sub-topics and use sub-headings.
- Arrange the sub-topics in accordance with a basic plan or logical progression. For example:  
Order of time  
Order of location  
Order of importance

**Order of process**

Parallel order.

**Discussion**

- Analyse and evaluate the facts already presented.
- Present your expert opinions. Avoid emotional statements or opinions expressed in a "parent" tone.
- Based on the results of your research, argue the case for and against various courses of action, estimate the possible effects, and then recommend a suitable course of action.
- If you wish, briefly include some additional material to support your argument, e.g. graph, diagram, table, picture.
- Throughout the discussion, refer to any appendices you have attached to supplement the information in the body of the report.

**Conclusions**

- Summarise the discussion.

- Summarise your findings and inferences.
- Emphasise the significance of your subject matter.
- Refer briefly to any wider consideration, outside your terms of reference, on which your report may have a bearing.

**Recommendations**

- Make recommendations based on your findings and inferences.
- Be as specific as you possibly can.
- State clearly what action should be taken as a result of your recommendations, and by whom.
- Use subjunctive mood, e.g. "That ... be [past tense of verb]"
- Set your recommendations out step by step and in a logical sequence.
- Do not put more than one step in each recommendation.
- Always number your recommendations.
- Keep your explanations out of the recommendations. If it needs explaining, do so in the discussion section of the report.
- If you expect a "knockback" on some of your recommendations, include some alternatives in the recommendations.
- Don't be afraid to recommend further investigation if you feel you still don't have the answer when it is time to write the report.

**Close**

- Signature.
- Printed name.
- Position.
- Name of organisation or committee.
- Date that the report was completed or signed.

**Bibliography (if applicable)**

- Record the bibliographic details (i.e. author, title, edition, publisher, place of publication, and year of publication) for the sources of information used.
- List the sources of information alphabetically by author.

**Appendices (if applicable)**

- The appendices contain data (such as charts, tables, photographs, maps and statistics) that support the body of the report. These are located in a separate section to avoid disrupting and cluttering the flow of the discussion.

**Glossary or List of Abbreviations (if applicable)**

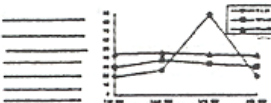
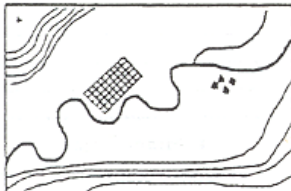
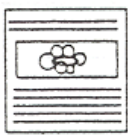
- If the report is particularly complex and involves terminology that the reader may not be familiar with, include a glossary (mini-dictionary) to explain the meaning of words and terms.
- If there are a number of abbreviations (acronyms, initials or shortened words), create a list of abbreviations and what they stand for.

**Index (if applicable)**

- If the report is over 20 pages long, an index will help the reader find specific information contained within the report more easily than is possible with the table of contents.

## Layout of a Formal Report

|                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Title Page</b></p> <p style="text-align: center;">Title of Report</p> <p>Details of Report Receiver      Details of Report Sender</p>                                                                                                                                                                                                                                                                                        | <p><b>Summary</b></p> <p>Summary</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>                                                                                                                                                                                    |
| <p><b>Table of Contents</b></p> <p>1. _____ P.1</p> <p>    A _____ P.2</p> <p>        i _____ P.2</p> <p>        ii _____ P.3</p> <p>        iii _____ P.3</p> <p>            a. _____ P.3</p> <p>            b. _____ P.4</p> <p>2. _____ P.5</p> <p>    A _____ P.6</p> <p>    B _____ P.7</p> <p>        i _____ P.7</p> <p>        ii _____ P.8</p> <p>            a. _____ P.8</p> <p>3. _____ P.9</p> <p>    A _____ P.9</p> | <p><b>Introduction (i)</b></p> <p>Introduction</p> <p>1. Purpose _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>2. Scope _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>                                                                                                                        |
| <p><b>Introduction (cont'd)</b></p> <p>3. Background _____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>                                                                                                                                                                                                                                                                          | <p><b>Body of Report (i)</b></p> <p>1. Major Topic Heading</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>    a. Minor Topic</p> <p>        _____</p> <p>        _____</p> <p>        _____</p> <p>        _____</p>                                                                                   |
| <p><b>Body of Report (ii)</b></p> <p>_____</p> <p>2. Major Topic Heading</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>3. Major Topic Heading</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>                                                                                                                                                | <p><b>Body of Report (iii)</b></p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>    a. Minor Topic</p> <p>        _____</p> <p>        _____</p> <p>        _____</p> <p>        _____</p> <p>    b. Minor Topic</p> <p>        _____</p> <p>        _____</p> <p>        _____</p> <p>        _____</p> |

| Conclusions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Recommendations                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Conclusions</b></p> <p>1. _____</p> <p>_____</p> <p>2. _____</p> <p>_____</p> <p>3. _____</p> <p>_____</p> <p>4. _____</p> <p>_____</p> <p>_____</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p><b>Recommendations</b></p> <p>1. _____</p> <p>_____</p> <p>2. _____</p> <p>_____</p> <p>3. _____</p> <p>_____</p> <p>_____</p>                                                                                                                                                                                |
| <p><b>Bibliography</b></p> <p><b>Bibliography</b></p> <p>Designing for Magazines<br/>Jan V White<br/>R.R. Bowker Company, N.Y. &amp; London, 1982.<br/><i>An excellent guide to the whole concept of magazine design.</i></p> <p>Marketing for Small Publishers<br/>Keith Smith<br/>Isler Action Trust, London 1983.<br/><i>An excellent guide to the marketing of books for small publishers and self-publishers.</i></p> <p>Postscript Language Reference Manual<br/>Adobe Systems Incorporated<br/>Addison Wesley Publishing, Reading, Massachusetts, 1985.<br/><i>The comprehensive guide and reference text on this page description language.</i></p> | <p><b>Appendix (i)</b></p> <p><b>1. Graphs</b></p>    |
| <p><b>Appendix (ii)</b></p> <p><b>2. Maps</b></p>  <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p><b>Appendix (iii)</b></p> <p><b>3. Brochures</b></p>                                                                                  |

Source: Elder, B. 1994, *Communication Skills*, Macmillan, South Melbourne, pp. 369-376.

## Example of a CSU Simple Report

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                              |  |                                                                                                    |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|--|----------------------------------------------------------------------------------------------------|
|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Form 3:<br><br><h1 style="text-align: center;">HAZARD REPORT</h1> <div> Version: 2.7<br/>13 July 2005 </div> <div> Next Form Review:<br/>January 2006 </div> |  | Registration Number:<br><br><h2 style="text-align: center;">W/008/2008</h2><br><br>Office Use Only |
| <p style="text-align: center;"><b>A hazard is any unsafe occurrence or unsafe condition which could result in injury, illness or damage</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                              |  |                                                                                                    |
| <p style="text-align: center;"><b>Part 1: Report by Originator</b></p> <p><b>ALL campuses</b> - complete and forward to HR Administration Assistant (EHS) Graham Building Wagga Wagga Fax 34005 (EHS) or 32886 (HR)</p>                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                              |  |                                                                                                    |
| <p><b>Your Details:</b></p> <p>YOUR NAME: Jane Doe</p> <p>CONTACT NUMBER: 30000</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                              |  |                                                                                                    |
| <p><b>Hazard Details:</b></p> <p>HAZARD LOCATION: Building 000 Room 1</p> <p>DESCRIPTION OF HAZARD: Edging strip on stairs – trip hazard</p> <p>.....</p> <p>CONTRIBUTING FACTORS: Edging strip is broken</p> <p>SUGGESTIONS TO REMEDY HAZARD: Replace edging strip</p>                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                              |  |                                                                                                    |
| <p style="text-align: center;"><b>Part 2: Action by Human Resources Office</b></p> <p style="text-align: center;">Register Form and log details, contact originator to advise receipt, then forward original to appropriate area for action</p> <p>DATE RECEIVED: 20 August 2008</p> <p>ORIGINATOR CONTACTED: YES <input type="checkbox"/> Yes/ No <input type="checkbox"/> DATE CONTACTED: 20 August 2008</p> <p>FORWARDED TO: John Doe, Facilities Management (For Actioning) Fred Smith, Supervisor (For Manager Information)</p> <p>DATE FORWARDED: 20 August 2008 REVIEW DATE: 25 August 2008</p> |                                                                                                                                                              |  |                                                                                                    |
| <p style="text-align: center;"><b>Part 3: Action by Area Head</b></p> <p style="text-align: center;">Complete details of actions taken to control hazard, then return original to Human Resources Office</p> <p>DATE RECEIVED: 21 August 2008</p> <p>ACTIONS TAKEN: Edging strip has been replaced – all stairs checked</p> <p>DATE COMPLETED: 25 August 2008</p> <p>PRINTED NAME: John Doe</p> <p>SIGNATURE: .....</p>                                                                                                                                                                                |                                                                                                                                                              |  |                                                                                                    |
| <p style="text-align: center;"><b>Part 4: Review and Filing</b></p> <p style="text-align: center;">Contact originator and advise of actions, complete details in hazard register</p> <p>DATE RECEIVED: 26 August 2008</p> <p>ORIGINATOR CONTACTED: YES <input type="checkbox"/> Yes/ No <input type="checkbox"/> DATE: CONTACTED: 26 August 2008</p> <p>DETAILS ENTERED IN REGISTER: YES <input type="checkbox"/> Yes/ No <input type="checkbox"/> DATE REGISTERED: 26 August 2008</p>                                                                                                                 |                                                                                                                                                              |  |                                                                                                    |

**Source:** Charles Sturt University 2008, Division of Human Resources, NSW.

**Memo Report****MEMORANDUM**

Memo to: Stewart Jensen, CEO  
From: Gary Pence  
Date: 23 October 19XX  
Subject: Report to Reduce Communication Problems and Increase Sales Overview

Last quarter, our sales dropped 14%. I believe a communication breakdown between sales associates and buyers has contributed to the decline.

In our company, most sales associates do not know their buyers. The sales associates I spoke with felt intimidated by and did not communicate with the buyers. The buyers, on the other hand, aren't receiving the information they need to purchase the merchandise that the customers want.

In this report, I'll provide more information on the problem and offer a solution that I believe will help improve communication and increase sales.

**Statement of the Problem**

Simply stated, the problem is a lack of communication between the buyers and sales associates. The sales associates, who work directly with the customers, know what shoppers are looking for and what they request. Now that the company is emphasising customer satisfaction, it is more important than ever to have the merchandise that customers want.

For example, I have worked in the Young Men's Department for 18 months, yet no buyer has asked me what my customers want. I've noticed that the buyers for Young Men's clothing are middle-aged men who are busy trying to get the best clothing deals they can, rather than finding out what the customers are requesting. As a result, we get good prices on clothing, but customers aren't buying because the merchandise doesn't suit young male shoppers' tastes. Because I get direct feedback from the customers on their preferences, I'm in a good position to help buyers purchase clothing that will sell. Unfortunately, we have no formal way for me to communicate with the buyers.

**Proposed Solution**

To ensure that our customers receive the merchandise they want, we need to set up a regular exchange of information between the buyers and the sales associates. This can be accomplished by having regular meetings and by conversations over the phone.

We could arrange meetings, which would require each department's buyers to go to three stores monthly. Since there are 22 stores and two buyers per department, one buyer would visit each department about once every quarter. The meetings could be held in either the department's office or in the store training room.

Between meetings, I recommend that sales associates call their buyers directly at least monthly.

**Advantages and Disadvantages of Adopting the Solution**

To save time and costs, I considered communication solely by mail or telephone, but I rejected these options because they lack timeliness, direct feedback, and face-to-face interaction. Without meeting and brainstorming, the quality of the discussions is diminished. Sales associates are used to working directly with customers, and they feel more comfortable meeting face-to-face.

Communicating by mail would be less expensive than having meetings, but it creates a time delay in any interaction. This delay could frustrate both the associates and the buyers, which could lead to reluctance in writing and a return to the original problem.

Communication only during the meetings between buyers and sales associates would not be effective simply because of infrequent interaction (every 3-4 months).

Other benefits of improving communication between the buyers and the sales associates follow:

- Improved customer relations because we'll be responding to their merchandise requests.
- A mutually beneficial working relationship between buyers and sales associates.
- Increased sales because we'll be stocking merchandise that customers want.

An added benefit could result when the buyers actually visit the departments of the sales associates and see the floor plans. With their merchandising experience, buyers might suggest alternative ways of arranging the products on the floor to increase customer traffic and encourage sales.

With direct interaction between buyers and sales associates leading to more frequent communication, we should notice a better and more productive working relationship.

### **Conclusion**

Our sales have dropped 14% in the last quarter, and I believe that lack of communication between sales associates and buyers has contributed to the drop-off. To resolve the lack of communication, I recommend establishing regular meetings and telephone conversations between buyers and sales associates as described in this report.

If communication between sales associates and buyers takes place, buyers should begin to understand the needs of customers through their sales associates. From this, customer satisfaction will increase as well as sales.

**Source:** Brock, S. 1992, *Writing Business Proposals and Reports*, Crisp, Menlo Park, California, pp. 41-43.

## Feasibility Study

### MEMORANDUM

Memo to: Stewart Jensen, CEO  
From: Cheryl Babcock  
Date: 18 November 19XX  
Subject: Studying the Feasibility of Establishing Regular Meetings Between Sales Associates and Buyers

### Overview

At your request, my staff and I have concluded our study of the feasibility of our sales associates and buyers meeting regularly. In our meeting last month, we all agreed with Gary that lack of communication has contributed to the decline of sales.

The primary purpose of this study is to explore the logistics of establishing the meetings. To do this, we've included a description of the details of our project, drawn conclusions to our findings, and offered recommendations for implementing the meetings.

### Background

According to our financial statement, our sales dropped 14% last quarter – and our accounting department reports another decline so far this quarter. Gary reports that a communication breakdown between sales associates and buyers has contributed to the decline. From this experience as a sales associate, he states that most sales associates do not know their buyers, and those who do, feel intimidated by and do not communicate with the buyers.

The problems created by this lack of communication lead to the buyers not receiving the information they need from the sales associates to purchase the merchandise that the customers want.

### Project Details

#### Approach:

Our first step was to survey a cross section of buyers and sales associates to find out their perceptions. We sent a questionnaire to the 125 sales associates and 44 buyers in the men's wear departments. Surprisingly, we received 111 responses from the associates and 34 responses from the buyers. Generally, in surveys we consider a 40% response to be excellent. Our responses with this survey ranged from 77% to 88%. A consensus agreed that regular communication between the two groups would help improve merchandise selection and display.

After we reviewed the responses to our survey, we interviewed by telephone a cross-section of both buyers and sales associates. Then we compiled and analysed their comments. The results of both the survey and the interviews will be sent to you next week.

#### Findings:

The majority agreed that regular communication would improve the relationship between the two groups and should increase sales. The problem was how to set up the new communication systems. We studied the possibility of communication by telephone because it would be faster and less expensive than any other method.

Communicating by mail or fax would be cost effective, but mailing creates a time delay and not every men's wear department has a fax machine yet – although we understand that each department will have fax machine by early 2003.

Communication through meetings between buyers and sales associates would accomplish more than by any other method simply because both groups respond well through face-to-face

interaction. We encounter time and cost problems if we consider meeting more than every 3 – 4 months, and meeting less often would not permit the regular dialogue we need between the two groups.

### **Conclusion**

To ensure that our customers receive the merchandise they want, we agree with Gary that we need to set up a regular exchange of information between the buyers and the sales associates.

As a result of our survey and interviews, we can accomplish this new communication by combining media – having regular quarterly meetings and semi-monthly conversations over the phone.

If communication between sales associates and buyers takes place as Gary suggested, buyers should begin to understand the needs of customers through their sales associates. Responses to our survey suggested that customer satisfaction will increase as well as sales.

### **Recommendations**

Regular meetings would require each department's buyers to go to three stores quarterly. When the buyers visit the stores, they will also have an opportunity to suggest alternative ways of displaying the merchandise. Generally, sales associates have fewer than 5 years' experience in merchandising while buyers have an average of 9 years' experience. We believe that each store will benefit from the buyers' merchandising knowledge.

Between meetings, sales associates should call their buyers semi-monthly, and by early 2003, when each department gets its own fax machine, buyers who are in the field can keep in touch with the associates.

With your approval, we will draft a memo to all buyers and sales associates and include a tentative schedule of meetings for next year.

With direct interaction between buyers and sales associates leading to more frequent communication, we should notice a more productive working relationship and, most important, increased sales in future quarters.

**Source:** Brock, S. 1992, *Writing Business Proposals and Reports*, Crisp, Menlo Park, California, pp. 45 - 47.

A Project Status Report Template (below) as well as other resources and information are available on the Project Service Centre website:  
<http://www.csu.edu.au/division/psc/plframework/>



**PROJECT:** <project name> **STATUS REPORT #1,** <effective date>

| <b>Status - Budget:</b> ●                                                                                                                                                                                                                                     |               | <b>Timeframe:</b> ●     |          | <b>KEY ISSUES &amp; RISKS</b>      |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|-------------------------|----------|------------------------------------|---------------|---------|----------------------|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------|-----------------|--------|-----------------|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------|--------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|-------------|-------|-------------------------|--|--|--|--|--|--|--|--|--|--|--|--|
| <table border="1"> <tr> <th>Budget Status</th> <th>Amount</th> </tr> <tr> <td>Approved</td> <td>&lt;value&gt;</td> </tr> <tr> <td>Spent to date</td> <td>&lt;value&gt;</td> </tr> <tr> <td>Estimate to complete</td> <td>&lt;value&gt;</td> </tr> </table>    | Budget Status | Amount                  | Approved | <value>                            | Spent to date | <value> | Estimate to complete | <value> | <table border="1"> <tr> <th>Timeframe</th> <th>Date</th> </tr> <tr> <td>Project started</td> <td>&lt;date&gt;</td> </tr> <tr> <td>Target end date</td> <td>&lt;date&gt;</td> </tr> <tr> <td>Estimated end date</td> <td>&lt;date&gt;</td> </tr> </table> | Timeframe | Date | Project started | <date> | Target end date | <date> | Estimated end date                                                                                                                                  | <date> | <table border="1"> <tr> <th>Description</th> <th>Owner</th> <th>Resolve by action, date</th> </tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </table> |  |  | Description | Owner | Resolve by action, date |  |  |  |  |  |  |  |  |  |  |  |  |
| Budget Status                                                                                                                                                                                                                                                 | Amount        |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Approved                                                                                                                                                                                                                                                      | <value>       |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Spent to date                                                                                                                                                                                                                                                 | <value>       |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Estimate to complete                                                                                                                                                                                                                                          | <value>       |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Timeframe                                                                                                                                                                                                                                                     | Date          |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Project started                                                                                                                                                                                                                                               | <date>        |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Target end date                                                                                                                                                                                                                                               | <date>        |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Estimated end date                                                                                                                                                                                                                                            | <date>        |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Description                                                                                                                                                                                                                                                   | Owner         | Resolve by action, date |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
|                                                                                                                                                                                                                                                               |               |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
|                                                                                                                                                                                                                                                               |               |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
|                                                                                                                                                                                                                                                               |               |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
|                                                                                                                                                                                                                                                               |               |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| <b>MAJOR DELIVERABLES</b>                                                                                                                                                                                                                                     |               |                         |          | <b>PROGRESS &amp; ACHIEVEMENTS</b> |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| <table border="1"> <tr> <th>Milestone</th> <th>Target Date</th> <th>Status</th> </tr> <tr> <td>1.</td> <td>&lt;date&gt;</td> <td>&lt;status&gt;</td> </tr> <tr> <td>2.</td> <td> </td> <td> </td> </tr> <tr> <td>3.</td> <td> </td> <td> </td> </tr> </table> |               |                         |          | Milestone                          | Target Date   | Status  | 1.                   | <date>  | <status>                                                                                                                                                                                                                                                 | 2.        |      |                 | 3.     |                 |        | <div>           ○ ...<br/>           ○ ...<br/>           ○ ...<br/> <br/>           ○ ...<br/>           ○ ...<br/>           ○ ...         </div> |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| Milestone                                                                                                                                                                                                                                                     | Target Date   | Status                  |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| 1.                                                                                                                                                                                                                                                            | <date>        | <status>                |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| 2.                                                                                                                                                                                                                                                            |               |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
| 3.                                                                                                                                                                                                                                                            |               |                         |          |                                    |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |
|                                                                                                                                                                                                                                                               |               |                         |          | <b>PLANNED ACTIVITIES</b>          |               |         |                      |         |                                                                                                                                                                                                                                                          |           |      |                 |        |                 |        |                                                                                                                                                     |        |                                                                                                                                                                                                                                                                             |  |  |             |       |                         |  |  |  |  |  |  |  |  |  |  |  |  |

Note: ● If spent + estimate to complete <= approved budget: estimated end date is before target end date, else ●

## Monthly Reports

### 1. THE TITLE PAGE

A long report will usually have a title page, which should include the title, the author, the reader for whom the report is intended, and the date of completion.

Because the purpose of the title is to make it clear what the report is about, a good title may be quite long. Remember that using a complete and concise title helps writers to clarify their terms of reference.

### 2. THE INTRODUCTION

The purpose of the report should be clearly stated and, if necessary, the reader should be reminded of the general goals of the organisation.

### 3. SPECIFIC GOALS FOR THE MONTH

State clearly and concisely what the goals for the month were. These should be as specific as possible and may be set out in point form. For example:

*The goals for this month were:*

- (a) To finalise the plans for the May youth camp.*
- (b) To increase hospital visitations by 10% over last month.*
- (c) To prepare a draft budget for 2002.*

### 4. STRATEGIES ADOPTED TO MEET THIS MONTH'S GOALS

This will be a description of how you went about trying to achieve the goals that had been set for the month. For example:

*In order to finalise the plans for the May youth camp, meetings were scheduled for 1 – 3pm each Monday. Those invited were .... An agenda for the first meeting was circulated one week prior to the meeting. At the conclusion of each meeting, a list of points was identified as the agenda for the following meeting.*

### 5. ACHIEVEMENTS FOR THE MONTH

This will be a summary of the successes you had in meeting the goals for the month and details of achievements that had not been planned. For example:

*Plans for the May youth camp were finalised after three meetings. An outline of the program for the camp is attached. All arrangements for accommodation and food have been finalised and deposits have been collected from all who will be attending.*

It will sometimes be appropriate to include some simple statistics to help explain your achievements for the month. These can be as simple as a list of activities showing how many people participated, or they may be more detailed summaries such as those given as examples in the earlier section on using visual materials to support your report.

### 6. CONSTRAINTS EXPERIENCED IN ACHIEVING THE GOALS

Not everything will go according to your plans each month. It is important to record why goals were not achieved so that the reader can appreciate the constraints under which you were operating. The information in this section of your report can provide very valuable background information for your future plans or for recommendations that you might make. For example:

*The major reason that the draft budget for 1993 could not be finalised was that the information on funding from ... is not yet available. This meant that we were unsure of the number of staff who could be employed. It is anticipated that the information will be available by 15<sup>th</sup> June.*

## 7. OBJECTIVES TO BE ACHIEVED OVER THE NEXT MONTH

Here you identify, as precisely as possible, what you intend to achieve during the next month. The more specific you make these statements, the more use they will be in guiding your activities, and the easier it will be to determine whether or not you achieve your objectives. For example:

*During June our objectives are to:*

- (a) Purchase a new computer and word-processing package.*
- (b) Conduct six one-day training programs for new youth counsellors.*
- (c) Evaluate our telephone counselling service.*

## 8. RECOMMENDATIONS

These are your suggestions for what action should be taken by the person or persons reading your monthly report. The general guidelines given previously also apply here.

**Source:** Killen, R. & Killen, A. 1992, *Report Writing*, Hunter Educational Services, Newcastle, pp. 19-20.

### Structure of a Research Report

- 1. Introduction**  
An outline of the area, problem or issue studied, its scope and aims.
- 2. Literature review**  
A critical account of existing studies in the area.
- 3. Methodology**  
An account of how you went about the study, and why you adopted this approach.
- 4. Results**  
A report on what you found.
- 5. Discussion**  
A critical analysis of your findings in the light of other work.
- 6. Conclusion**  
A brief summary of your conclusions.
- 7. References**  
A complete list of all the works referred to in a standard format.

**Source:** University of Warwick 1994 cited in Blaxter, L. Hughes, C. & Tight, M. 1996, *How to Research*, Open University Press, Buckingham, p. 217.

Write your research paper in third person voice that avoids "I believe ..." or "It is my opinion that ..." However, use first person "I" when speaking of personal efforts, as with: "I attempted to identify..." or "In this experiment I..." Attribute human functions to yourself, but not to non-human sources. For example, "The total study considered several findings" would be inaccurate.

**Source:** Lester, J.D. 1987, *Writing Research Papers: A Complete Guide*, 5<sup>th</sup> edn, Scott, Foresman & Co., Glenview, Illinois, 1987, p. 96.

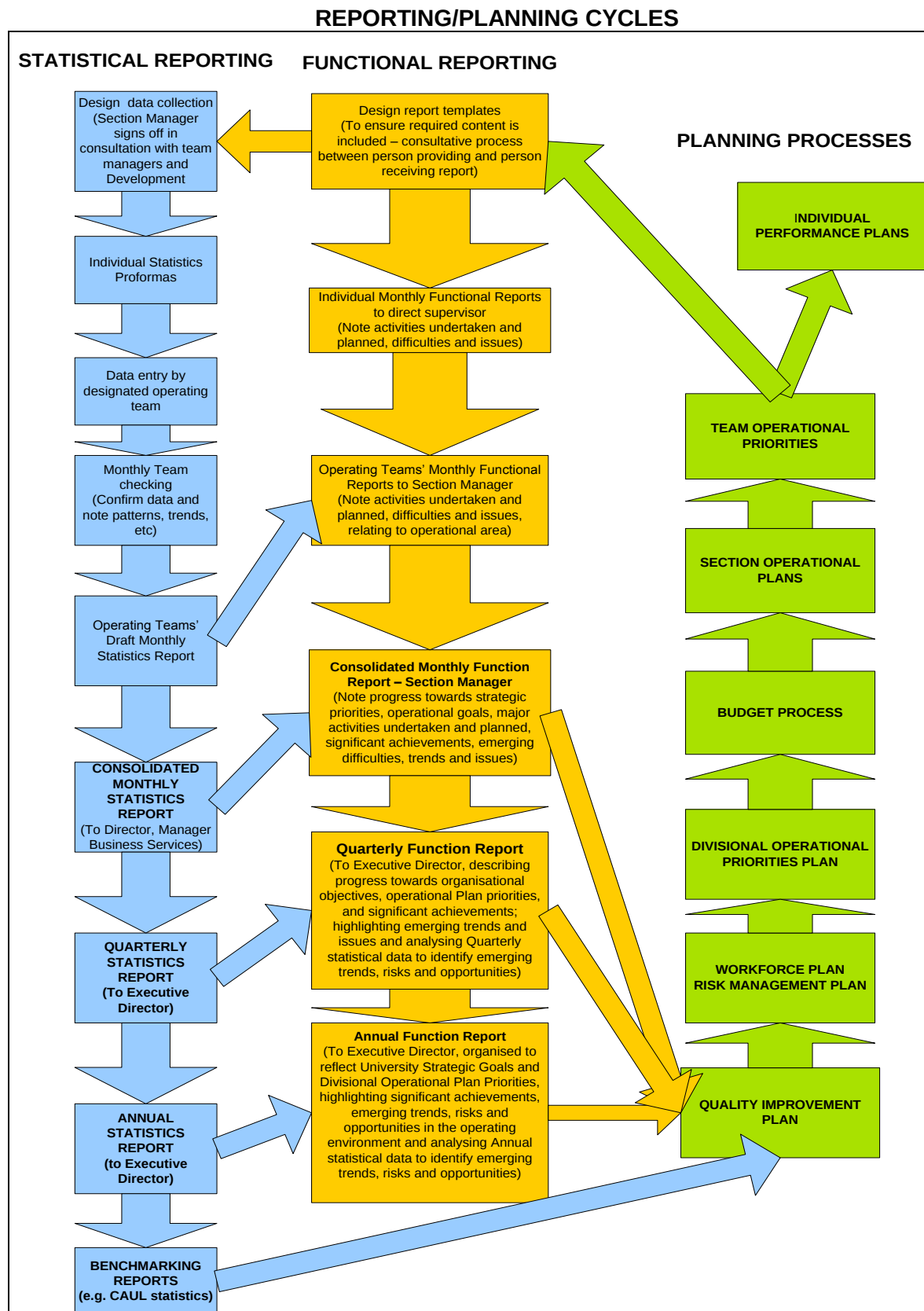


\* does the opening paragraph set the background or purpose for the report?

- prepare an monthly report for your team outlining progress, activities and any issues. Group discussion to follow.

This image shows a single sheet of white paper with horizontal blue ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

CSU Division of Library Services have developed guidelines for the development of monthly, quarterly and annual reports for their area as **Appendix 6**. This is an excellent resource for other department to use in the coordination of reports required in their area. The below diagram is an excerpt from the guidelines that shows an example of reporting cycles and how they may occur within various Faculties and Divisions of CSU.



Source: CSU Division of Library Services Guidelines on Monthly, Quarterly and Annual Reports 2008.

## Initiatives Management Process at CSU

The Register of Initiatives is administered by the CSU Project Service Centre and is the central register of process improvement, innovation or compliance initiatives whether, proposed, in progress, deferred, or pending consideration. The Register is a key component of the Initiatives Handling Process (IHP).

The Initiatives Advisory Committee (IAC) was established as the key advisory body operating within the Initiatives Handling Process (IHP).

The Initiatives handling process does not replace traditional committee processes for considering discussion papers or proposals in other formats, however the initiative should only be registered after the proposal has been considered by one of the following authorities:

- The University Plan committees, namely:
  - The Learning and Teaching Committee
  - The University Course Planning Committee
  - The Research Planning Committee
  - The Institutional Development Committee
- The Academic Senate
- Faculty Deans
- Executive Directors and Directors of Offices
- The Vice-Chancellor and Deputy Vice-Chancellors



## Workplace Activity – Initiative Proposal Web Form

*Case Study:* CSU has decided that it would be more efficient for staff to have an Online Travel Requisitions and Acquittals system available to staff on the CSU Website.

Prepare a mock funding submission for this new initiative using the Initiative Proposal Web Form and information provided on the Initiatives webpage:

<http://www.csu.edu.au/division/psc/initiatives/form.htm> .

Ensure that the proposal links with the objectives of the University Strategy found

[http://www.csu.edu.au/division/vcoffice/vc/papers/strategic\\_plan\\_2007-2011.pdf](http://www.csu.edu.au/division/vcoffice/vc/papers/strategic_plan_2007-2011.pdf) .

Print off the page being careful not to press final submit button. Ask your supervisor, peer or mentor to review and provide feedback.

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## REPRESENTING DATA VISUALLY

### Guidelines on Presenting Visual Data

Once you have collected your primary and secondary information, you may find that it enhances the credibility, visual appeal and accessibility of your report if you represent the data visually.

Always bear in mind that a visual representation of the data should not compete with your written report. The idea is to make them complementary. It is important to always discuss any findings you believe the visual data reflects – never include it as a substitute for discussion and expect it to speak for itself. For example:

“ In table 6.2 we can see the dramatic decline in...”

Here are some pros and cons to representing data visually:

#### Pros:

- It can be a great way of summarising information so that it can be accessed quickly and by a wider audience
- It can add to your argument or recommendations in a powerful manner
- It conveys a lot of information in a small space
- It makes your report more visually appealing (and more likely to be read).
- It can reveal trends, allow comparisons and reflect possibilities
- It adds to the professionalism of your report.

#### Cons:

- It can inaccurately represent information – if the wrong type of visual representation is chosen by the report writer
- It can be distracting – if the visual data is distorted or it is too decorative

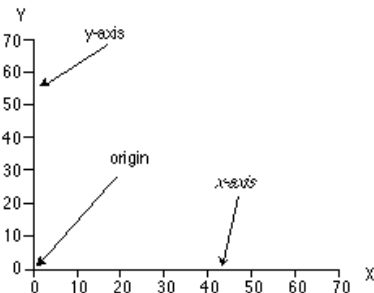
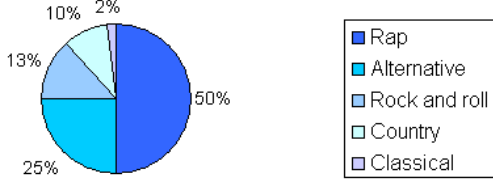
Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 12

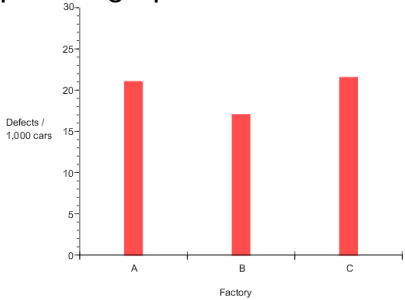
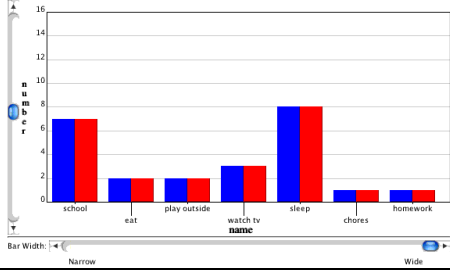
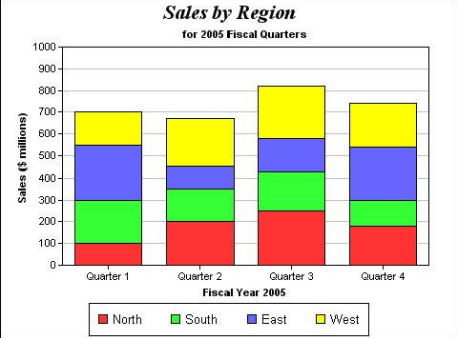
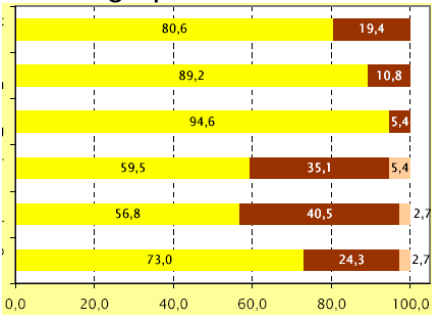
1. Graphs and diagrams are known as figures (e.g. 'Figure 28(a) shows...'). Tables are known, unsurprisingly, as tables (e.g. 'Table 4 shows ...'). Photographs are known as plates (e.g. 'Plate 2 shows....') or figures.
2. Number all visuals. If visuals are part of a document, ensure that visuals are numbered consistently with the rest of the document - for example, if a bar chart is the third figure in the second section or chapter of your document, it will be figure 2.3.
3. Consider providing lists of figures, tables and plates at the front of the document, immediately after the table of contents.
4. Label all visuals. Place numbering and labelling above tables, and below figures or plates.
5. Ensure that all components of visuals are identified.
  - With graphs and diagrams, labels may be written, typed or printed onto the visual. Such labels may be near or over the part of the visual they are identifying, or connected to those parts by arrows or lines (callouts).
  - Alternatively, a key or legend may be used. Such a key or legend will explain to the viewer what identifying systems of colour or cross-hatching mean.
6. Ensure that units of measurement on axes are clearly labelled.

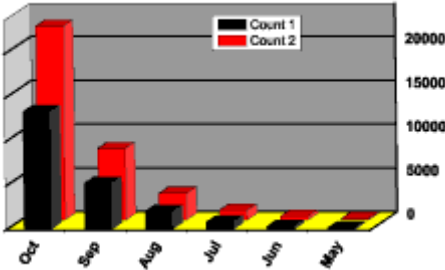
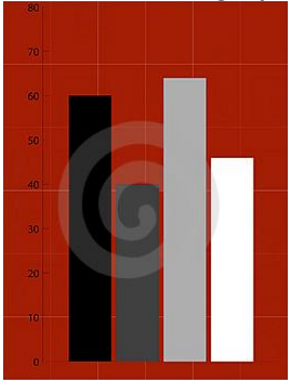
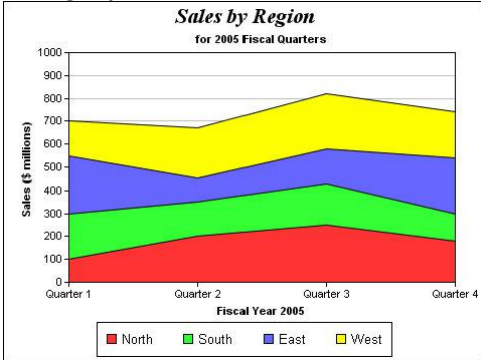
7. Cite the source of your data: where did they come from? If the visual material is protected by copyright, and if your document will have wide circulation, obtain written permission to reproduce it from the copyright holder.
8. Place any explanatory information in footnotes below the visual.
9. Lay out visuals to ensure maximum clarity.
  - Ensure that there is a fair amount of white space around the visual, separating it from the surrounding text of the report.
  - With tables, use white space, lines, shading and typography or fonts to make blocks of data more digestible.
  - With graphics, follow guidelines on colour use.
10. Position visuals with care.
  - If possible, place visuals in the middle of the page, with text above and below.
  - If a visual or group of visuals is so large that it could break up the flow of the text, consider placement in an appendix at the back of the document.
  - Place a visual close to the part of the text where you are discussing it. Don't compel your reader to shuffle back and forth between pages.
  - Refer to visuals in the text. 'For example, in table 6.2 we see...'

**Source:** Eunson, B. 1995, *Writing Technical Documents*, Wiley & Sons, Brisbane, p. 53.

Below is a summary of different visual representations and their strengths and weaknesses:

| Type of visual representation                                                                        | Strengths                                                                                                                                                               | Weaknesses                                                                                                                                 |
|------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| <p>XY graph</p>   | <ul style="list-style-type: none"> <li>• often used to show information that changes over time</li> <li>• can be used to plot several variables on one graph</li> </ul> | <ul style="list-style-type: none"> <li>• not relevant where time is not a variable</li> </ul>                                              |
| <p>Pie graph</p>  | <ul style="list-style-type: none"> <li>• often used to show the components of one sample of data – when the different components add up to 100%</li> </ul>              | <ul style="list-style-type: none"> <li>• if the components don't add up to 100% - this type of graph will distort your findings</li> </ul> |

| Type of visual representation                                                                                                                                                                                                                                                                          | Strengths                                                                                                                                                                                                                        | Weaknesses                                                                                                                                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Simple bar graph</b></p>  <p>Defects / 1,000 cars</p> <p>Factory</p>                                                                                                                                            | <ul style="list-style-type: none"> <li>often used to show information that changes over time</li> <li>can be used to represent several variables on one graph</li> <li>can be represented horizontally or vertically.</li> </ul> | <ul style="list-style-type: none"> <li>not relevant where time is not a variable</li> <li>not very precise and only relevant simple discrete figures – ie those that do not interact or rely on other figures or variables.</li> </ul> |
| <p><b>Multiple bar graph</b></p> <p>How I divide my 24 hour day</p>  <p>Bar Width: Narrow Wide</p>                                                                                                                   | <p>see above and:</p> <ul style="list-style-type: none"> <li>useful for showing sets of independent data</li> </ul>                                                                                                              | <p>see above</p>                                                                                                                                                                                                                       |
| <p><b>Stacked bar graph</b></p> <p>Sales by Region<br/>For 2005 Fiscal Quarters</p>  <p>Sales (\$ millions)</p> <p>Fiscal Year 2005</p> <p>Quarter 1 Quarter 2 Quarter 3 Quarter 4</p> <p>North South East West</p> | <p>see above</p>                                                                                                                                                                                                                 | <p>see above</p>                                                                                                                                                                                                                       |
| <p><b>100% bar graph</b></p>  <p>0,0 20,0 40,0 60,0 80,0 100,0</p>                                                                                                                                                  | <ul style="list-style-type: none"> <li>shows the relative quantities to the 100% variable</li> </ul>                                                                                                                             | <ul style="list-style-type: none"> <li>if the components don't add up to 100% - this type of graph will distort your findings</li> </ul>                                                                                               |

| Type of visual representation                                                                                                                                                                                                                        | Strengths                                                                                                                                | Weaknesses                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <p>3D bar graph</p>                                                                                                                                                 | <ul style="list-style-type: none"> <li>attractive and dramatic</li> </ul>                                                                | <ul style="list-style-type: none"> <li>the value of any layer of data should not shadow out any lesser value</li> </ul> |
| <p>Variation/deviation bar graph</p>                                                                                                                               | <ul style="list-style-type: none"> <li>enables you to represent negative values</li> </ul>                                               | <ul style="list-style-type: none"> <li>not relevant if negative values are not to be represented</li> </ul>             |
| <p>Area graphs</p>                                                                                                                                                | <ul style="list-style-type: none"> <li>enables you to represent area</li> <li>can reveal comparative and overall trends</li> </ul>       | <ul style="list-style-type: none"> <li>the value of any layer of data should not shadow out any lesser value</li> </ul> |
| <p>Pictograms (also called pictorial chart, pictorial graph, or picture graph)</p> <p><b>Figure 2. Purchasing power of the Canadian dollar, 1980 to 2000</b></p>  | <ul style="list-style-type: none"> <li>can be two or three dimensional</li> <li>a very simple way of representing information</li> </ul> | <ul style="list-style-type: none"> <li>can be difficult to read</li> </ul>                                              |

| Type of visual representation                                                                                                                                                                                                                                                                                                                                                                                                                                | Strengths                                                                                                                                                  | Weaknesses                                                                                                             |       |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|-------|-------|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|-----|----|----|----|--------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------|
| <div>Tables</div> <table><thead><tr><th></th><th>Food</th><th>Gas</th><th>Motel</th></tr></thead><tbody><tr><td>Jan</td><td>12</td><td>17</td><td>10</td></tr><tr><td>Feb</td><td>17</td><td>11</td><td>21</td></tr><tr><td>Mar</td><td>22</td><td>29</td><td>14</td></tr><tr><td>Apr</td><td>14</td><td>10</td><td>17</td></tr><tr><td>May</td><td>12</td><td>17</td><td>10</td></tr><tr><td>Jun</td><td>19</td><td>15</td><td>20</td></tr></tbody></table> |                                                                                                                                                            | Food                                                                                                                   | Gas   | Motel | Jan | 12 | 17 | 10 | Feb | 17 | 11 | 21 | Mar | 22 | 29 | 14 | Apr | 14 | 10 | 17 | May | 12 | 17 | 10 | Jun | 19 | 15 | 20 | <ul style="list-style-type: none"><li>more accurate than graphs in representing precise quantities</li></ul> | <ul style="list-style-type: none"><li>trends and comparisons are sometimes not immediately obvious</li></ul> |
|                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Food                                                                                                                                                       | Gas                                                                                                                    | Motel |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| Jan                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 12                                                                                                                                                         | 17                                                                                                                     | 10    |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| Feb                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 17                                                                                                                                                         | 11                                                                                                                     | 21    |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| Mar                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 22                                                                                                                                                         | 29                                                                                                                     | 14    |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| Apr                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 14                                                                                                                                                         | 10                                                                                                                     | 17    |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| May                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 12                                                                                                                                                         | 17                                                                                                                     | 10    |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| Jun                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 19                                                                                                                                                         | 15                                                                                                                     | 20    |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| <div>Organisational charts</div>                                                                                                                                                                                                                                                                                                                                                                                                                             | <ul style="list-style-type: none"><li>a great way to represent hierarchies and relationships between staff</li></ul>                                       |                                                                                                                        |       |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| <div>Flow charts</div> <p>Figure 5: Resource development flow chart</p>                                                                                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"><li>useful for analysing or representing processes or procedures</li><li>useful for displaying decision points</li></ul> | <ul style="list-style-type: none"><li>can sometimes become redundant due to the complexity of the procedures</li></ul> |       |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |
| <div>Gant charts</div> <div>Timeline for suppliers and actions</div>                                                                                                                                                                                                                                                                                                                                                                                         | <ul style="list-style-type: none"><li>allows its user to plot complex and related information over time.</li></ul>                                         | <ul style="list-style-type: none"><li>some people do not understand Gant charts</li></ul>                              |       |       |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |     |    |    |    |                                                                                                              |                                                                                                              |

Based on: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 13,14,15 & 16

### Important points when representing information visually

1. When labelling and referencing your visual representations – graphs, charts and diagrams are known as figures; tables are known as tables; and photographs are known as plates.
2. Be sure to number all visual representations in a consistent easily referenced manner with both a number and title.
3. List your figures, tables and plates under individual titles on your contents page
4. Always cite the source of your data.
5. If explanatory information is needed either make reference to it in the body of your report or as a footnote – or both.
6. If the visual representation is cumbersome or interrupts the flow of your report, consider adding it as an appendix to your report.
7. When using colour – keep the number of colours to a minimum – the general rule is five per diagram. Also consider the message your colours are sending – for example, when representing financial data, red as a connotation it may not have when representing data of a different kind.
8. Avoid red/green patterns – those who are colour-blind have trouble with this colour combination.

Based on: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 13,14,15 & 16



### Group Exercise – Draft an Outline & Monthly Report

Looking at the report you have brought with you to today's session or examples provided along with what you have learned so far about report writing, prepare a monthly report and its outline for your team. Communicate progress, activities and any issues facing you now and into the next quarter. Where appropriate use visual data and statistics.

Whilst doing this think about:

- \* does the opening paragraph set the background or purpose for the report?
- \* How well does it communicate it's message?
- \* Does it contain all the sections required?
- \* Is it set out in a formal or informal fashion?
- \* Has the document been properly proofread or are there grammatical or spelling errors that detract from it's professionalism?
- \* Is there enough white space?
- \* Does the report use visual data effectively?
- \* Does the report need statistics and/or reference to outside sources to substantiate its message?

Nominate a scribe to write on butchers paper. Whole group discussion to follow.

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## REFERENCING STYLES AT CSU

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At a University like CSU correct referencing is a very important part of academic writing.

The academic world is all about knowledge building and the primary reason for citation, therefore, is that it encourages and supports the collective construction of academic knowledge (Walker & Taylor, 2006, pp. 29-30). Referencing also forms an essential part in avoiding any tendency towards plagiarism.

### Referencing Styles at CSU

Due to some differences from one School to another CSU students are advised that the important thing is to use the style of referencing required by their particular School or Faculty and to use it consistently.

Student Services have provided CSU Students and Staff have access to a comprehensive guide to the referencing protocol and procedures primarily accepted at Charles Sturt University which is the APA or American Psychological Association Style of referencing. **See Appendix 7** for a copy of this guide.

<http://www.csu.edu.au/division/studserv/learning/pdfs/apa2008.pdf>

Topics covered include:

- Principles – The Reference List
  - In-text Citations
  - Page and Paragraph Numbers
- Print resources
  - Books
  - CSU Subject Outlines and Readings
  - Periodicals (Journals, Newspapers, and
- Audiovisual Media
- Electronic Media
  - Online Journal Articles
  - Electronic Books, Curriculum Material,
  - Book Reviews, Reference Materials
  - Gray Literature, General Interest Media
  - Websites
- Secondary and Other Sources
- References: Sources used for this Summary

A copy of the American Psychological Association (APA) Style guide can also be found on the CSU website at: <http://www.csu.edu.au/division/library/ereserve/apa-style-guide.pdf>

## COMMON ABBREVIATIONS

Below is a summary of some common abbreviations which may also help in your writing.

| Abbreviation         | Description                                                                                                         |
|----------------------|---------------------------------------------------------------------------------------------------------------------|
| Anon.                | Anonymous                                                                                                           |
| App.                 | Appendix                                                                                                            |
| Biblio.              | Bibliography                                                                                                        |
| c.                   | chapter; circa, about, approximately                                                                                |
| cf.                  | confer, compare                                                                                                     |
| ed.                  | Editor                                                                                                              |
| eg                   | for example                                                                                                         |
| esp.                 | especially                                                                                                          |
| et al.               | et alii, and others                                                                                                 |
| etc                  | et cetera                                                                                                           |
| f.                   | and following                                                                                                       |
| fn.                  | Footnote                                                                                                            |
| fig.                 | Figure                                                                                                              |
| ibid                 | ibidem, in the same place                                                                                           |
| id                   | idem, the same                                                                                                      |
| ie                   | that is                                                                                                             |
| infra                | below (in the text)                                                                                                 |
| intro                | introduction                                                                                                        |
| loc. cit loco citato | in the place cited                                                                                                  |
| n.                   | note                                                                                                                |
| nd                   | no date                                                                                                             |
| no.                  | number                                                                                                              |
| n.p                  | no publisher                                                                                                        |
| op cit               | in the work cited                                                                                                   |
| p                    | page                                                                                                                |
| par.                 | Paragraph                                                                                                           |
| passim               | throughout (the text)                                                                                               |
| qv                   | quod vive – see (something referred to)                                                                             |
| QED                  | quod erat demonstrandum – here demonstrated                                                                         |
| S., sect.,           | section                                                                                                             |
| Sic                  | thus (to show that a word or phrase has been quoted correctly; used to alert the reader that this is not a mistake) |
| Supra                | above (in the text)                                                                                                 |

Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 29

## QUOTATIONS

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Quotations consist of someone else's words. A major part of referencing, they are used primarily to bolster an argument by providing a detailed, formal reference to an authoritative piece of writing and/or research.

If you are quoting less than four lines of text simply incorporate the quote into the body of the report and set off the quoted material in quotation marks. For example:

Evans admits that timing had a hand in the Purist Company's success: "My concerns about chemicals coincided with the growing concerns of consumers.". His goal is to now increase the company's business overseas...

If you are quoting more than four lines of text, lead into the quotation with a colon, leave two lines, indent at least ten spaces and run the quote as a block separate to your text. For example:

Our volunteers have a wide range of skills, but the core of them is business skills. They would include everything from business planning and financial management, to sales and marketing, production processes, and IT management. The assignments on offer to business volunteers are a many and varied as the skills they require. They could be developing a marketing plan for a publisher in Fiji, or people in restaurant operations in Cambodia.

In the above example quotation marks are unnecessary – quotation marks are only necessary when the quote is quoted within the body of the text. If the quoted passage does not begin with a sentence beginning or a capital letter, indicate this with an ellipsis. For example:

In selecting staff to operate our customer support lines, we have to be on the lookout for people who have '...the patience of a Saint, and the general wisdom of The Dalai Lama...'

If you alter the quote in any way be sure to indicate the missing matter with ellipsis marks. For example:

"In recent years volunteering has become more popular...The 2006 census, which measured volunteerism for the first time, found that 18 per cent of over-15s had done voluntary work in the year before the survey was taken..."

If you need to change a quote so that it's grammatically correct place the correction in brackets. For example:

Support reps understand that "A strong sense of humour, may be the only thing standing between (them) and a nervous breakdown."

Always ensure that your introductory text and the quotation are grammatically matched. Be alert for sloppy mistakes such as:

Support staff will have to understand that they will be continually 'struggles with an unending barrage of questions covering every conceivable aspect of their product.'

Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 30 & 31

## ADMITTING BIASES AND WEAKNESSES OF YOUR REPORT

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“It’s important to declare your biases (if you have them). This type of contextual information is important because, without it, you run the risk that your readers may be suspicious about your motives. This suspicion can damage your credibility.”

Source: Flanagan, S. (2007), *Report Writing Skills*. CSU Organisational Development. Page 36.

Identify any biases or weaknesses in the introduction of the report, for example:

This report has been commissioned by Charles Sturt University’s Faculty of Education to highlight the potential market for a Masters of Education degree at Ontario Campus. The possible weakness herein is that the only data available is from 2005.

## QUICK TIPS FOR REPORT WRITING

Use this checklist to ensure your report is complete and includes all relevant sections:

|                                    |                                                                                                                         |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| Title page                         | The title of the report                                                                                                 |
|                                    | The author's name and title                                                                                             |
|                                    | The date the report was written                                                                                         |
| Contents page                      | A contents heading                                                                                                      |
|                                    | All headings and sub-headings and their page numbers correspond with the actual contents                                |
|                                    | A list of tables and their page numbers                                                                                 |
|                                    | A list of figures and their page numbers                                                                                |
|                                    | A list of graphs and their page numbers                                                                                 |
|                                    | References and appendices sections and their page numbers.                                                              |
| Executive summary/Abstract         | A separate page                                                                                                         |
|                                    | A heading                                                                                                               |
|                                    | A summary of the main points in the report                                                                              |
| Introduction/<br>executive Summary | A definition of the topic and key terms                                                                                 |
|                                    | Set out the scope and focus of the topic                                                                                |
|                                    | Present a plan of the argument                                                                                          |
|                                    | Show the writer's stance.                                                                                               |
| Body of the report                 | Stick to the scope and focus of the topic                                                                               |
|                                    | Flow in a logical manner                                                                                                |
|                                    | Expand on the argument set out in the report                                                                            |
|                                    | Back up all claims with facts and evidence.                                                                             |
| Conclusion                         | Restate the main ideas                                                                                                  |
|                                    | Give the writers' stance on the topic                                                                                   |
|                                    | State any implications                                                                                                  |
|                                    | Make the necessary recommendations: interpret, analyse and and evaluate                                                 |
| Layout                             | Headings and subheadings should be consistent in size, number, font and colour                                          |
| Quotations                         | Enclosed in quotation marks                                                                                             |
|                                    | Less than three lines long                                                                                              |
|                                    | Sourced with the author's name, page number and date in brackets                                                        |
|                                    | Relevant                                                                                                                |
|                                    | Correct (they must be verbatim)                                                                                         |
|                                    | Sourced accurately.                                                                                                     |
| Tables & figures                   | Be referenced in the body of the text                                                                                   |
|                                    | Be framed                                                                                                               |
|                                    | Have a heading                                                                                                          |
|                                    | Be numbered correctly                                                                                                   |
| References                         | Be on a separate page                                                                                                   |
|                                    | Under the appropriate heading                                                                                           |
|                                    | Listed alphabetically by surnames                                                                                       |
| Always                             | Edit for jargon, avoid personal pronouns and contractions and Lead with your most convincing or most important material |
|                                    | Have I fulfilled the purpose of the report?                                                                             |
|                                    | Are the facts correct?                                                                                                  |
|                                    | Is the report comprehensive and relevant? Lead with your most convincing material.                                      |
|                                    | Are the layout and presentation well thought out, is the style clear, concise and professional                          |
|                                    | Proofread and check spelling, grammar and punctuation                                                                   |

Based on: <http://www.buseco.monash.edu.au/publications/qmanual/ch-07.html>

## REFLECTION AND WORKSHOP DEBRIEF



## Reflection – Taking it back to the Workplace

What was your key learning, and what ideas will you take back to your workplace?

Considering the importance of effective business and report writing, what will you do differently in the future?

What are you already doing that you wish to hold and to build on?

Try some of the exercises/tools with your leadership or management team.

[illegible]

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## FURTHER TOOLS, TEMPLATES AND RESOURCES

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### LIST OF APPENDICIS

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1. Charles Sturt University (CSU) Guidelines for Email Best Practice
2. Examples of CSU Letter from the Division of Human Resources
3. Example template for CSU Memorandum of Understanding (MOU)
4. Basic Grammatical Ideas
5. CSU Division of Library Services (DLS) Guidelines on reports
6. CSU Referencing Style (APA).

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