TRANSPARENCY MASTERS

The transparencies in the following collection have been designed to work in conjunction with the Canadian Edition of Klepp and Lannon's *Technical Communication*. Each transparency master illustrates a key concept or set of related concepts in the book. More transparency masters will be added later. Also, I plan to convert most of the masters to PowerPoint slides. I hope you find the transparencies useful.

—Don Klepp

The transparency masters have been organized in order of their application to material in the book, chapter by chapter:

Chapter 2 Communications Model **Chapter 3** Writing effective prose efficiently **Chapter 4** How to persuade Persuasive writing **Chapter 6** *The research process: preliminary Planning* **Chapter 7** *The research process: recording the Results* **Chapter 8** Sources cited Situation: Situation: (MLA citation) Situation: (APA citation) **Chapter 9** Summaries on the job The summary process **Chapter 10** Paragraph development Specific-to general: Paragraph coherence Paragraph unity **Chapter 11** Emphasize key points 1st person vs. 3rd person Klepp clarity index Gunning-Mueller fog index	**Chapter 12** Why graphic illustrations? Usage hints **Chapter 13** Recommended Headings Format **Chapter 15** Kinds of descriptive writing Procedures Specifications **Chapter 16** Sample process description Process analysis Instructions Clear instructions More hints **Chapter 18** Proposal structures Graphics in proposals **Chapter 19** Reporter responsibilities Topical vs. talking headings Reader orientation **Chapter 20** Summary/abstract Names of summaries: Introduction Conclusion **Chapter 21** Action structure for reports Formal and semi-formal report formats Inspection report structure	**Chapter 21** Sample inspection memorandum Trip report structure Short feasibility report Sample feasibility report Causal analysis structure Recommendations report (direct pattern) Recommendations report (indirect pattern) Direct pattern for recommendations report Direct pattern with talking headings Indirect pattern for recommendations report **Chapter 22** Semi-block format Block format Full block format Simplified format Sample request **Chapter 23** Application letter Enquiry letter Career orientations The new worker Introduction letter Self-inventory Snapshot résumé Kinds of job interview questions

WRITING EFFECTIVE PROSE EFFICIENTLY

1. Choose the content, based on:
   - technical or research notes
   - personal observations
   - arguments and evidence
   - deductions and conclusions
   - available illustrations

   Revise content now - efficient

2. Organize the blocks of material.
   - review audience needs and your purpose
   - choose appropriate headings

   Revise structure now - efficient

3. Write the first draft.
   - you can focus on phrasing
   - first draft may be close to final draft

4. Polish the document
   - delay, to gain perspective
   - use objective indexes and audience/purpose profile
   - revise content and structure, if necessary
   - edit for readability and tone
   - use additional proofreaders

HOW TO PERSUADE

(Aristotle's Principles)

ETHOS

PATHOS

LOGOS

- Quality of evidence
- Quality of supporting arguments
- Quality of reasoning
- Overall structure
- Quality of writing

PERSUASIVE WRITING

- Assess the political realities
- Anticipate reader resistance
- Know how to connect with readers
- Never ask for too much
- Recognize all constraints
- Support your claims convincingly
  i. appeal to your reader's needs
  ii. provide convincing evidence
  iii. appeal to common goals and values

Chapter 4. "Writing Persuasively", pp.64-76
Klepp and Lannon: ***Technical Writing***, Canadian Edition

THE RESEARCH PROCESS*: *preliminary planning

- know your purpose and audience
- write preliminary plan based on tentative outline: a series of questions, or a structured topical outline, or a clustered ideagram
- identify information sources:

primary sources:

- written enquiries to experts
- interviews
- experiments, studies, observation
- your notes or memory
- focus groups
- business files
- surveys

secondary sources:

- books
- newspapers, magazines
- internet sites
- electronic data banks
- gov't documents
- unpublished material
- special interest groups
- public agencies

- choose research methods
- write detailed research plan (include time mgmt)
- write a budget

THE RESEARCH PROCESS*: *recording the results

- record data - how? (see pp.147-150)
- evaluate and analyse - why? how? (see pp.151-157)
- fill in holes in the data base, or proceed to writing the report

Chapter 7. "Recording and Reviewing Research Findings"
Klepp and Lannon: ***Technical Writing***, Canadian Edition

THE RESEARCH PROCESS*: *documenting sources

- why necessary:
  - the ethical issue
  - the legal issue
  - the practical issue (helping your reader get more information)

- what to record:
  - detailed bibliographical information
  - pg. nos. of paraphrases
  - quotation marks and page nos. for quoted material
  - specific details re: dates & locations of interviews
  - detailed observations re: methods of conducting primary research

Chapter 8. "Documenting Research Findings"
Klepp and Lannon: ***Technical Writing***, Canadian Edition

SOURCES CITED

Cook, James, and Mattie Spinks. *The Only Way To Build Roads.* Saskatoon: Kramer Caterpiller Corporation, not dated. Pamphlet 436 of the series, *1001 Uses For Old Dirt*, available from the Kramer Caterpiller Corporation, Saskatoon.

Cruickshank, John R. *Third Degree Thyristors.* Vancouver: Dubbin House Publishers, 2000.

Lewis, R. S. "Why inventors need good accountants." *Electronics Today* Sept.1999 (22.9):18-29.

"27-inch TV sets." *Consumer Reports* Mar.2000 (65.3): 158-161.

REFERENCES

Cook, J., & Spinks, M. (not dated). *The only way to build roads.* Saskatoon: Kramer Caterpillar Corporation. Pamphlet 436 of the series, *1001 uses for old dirt*, available from the Kramer Caterpillar Corporation, Saskatoon.

Cruickshank, J. R. (2000). *Third degree thyristors.* Vancouver: Dubbin House Publishers.

Lewis, R. S.(1999, 12 September). Why inventors need good accountants. *Electronics Today,* 22(9), *18-29.*

Riley, M. F. (1996) Employment opportunities and job resources on the Internet[Online]. <http://www.jobtrak.com./jobguide/>

27 - inch TV sets. (2000, March). *Consumer Reports,* 65(3), 158-161.

SITUATION:

Memo to fellow researcher re: problem with a silicon bidirectional thyristor used on a heating control system for an electric heater in a ski hill snow packer

Source: John Cruickshank:
"the Motorola 2N60713A triac has been found especially durable in outdoor applications, over a wide temperature range"
p. 122, *Third Degree Thyristors*

Task: fit the above quote into a sentence and cite the source of the quote in a textual note.

However, John Cruickshank says that "the Motorola 2N60713A triac has been found especially durable in outdoor applications, over a wide temperature range"(2000, p. 122)

However, "the Motorola 2N60713A triac has been found especially durable in outdoor applications, over a wide temperature range"(Cruickshank, 2000, p. 122)

<u>SITUATION</u>: (MLA Citation)
Report to potential Internet users re: the multiplicity of search engines available to Internet users

Cynthia Leshin:
"Currently there are between 30-40(*sic*) different Web browsers." p. 5, *Internet Investigations In Business Communication*, 1997, Prentice-Hall Inc., New Jersey

Task: fit the above quote into a sentence and <u>cite the source of the quote in a textual note.</u>

However, Cynthia Leshin says that "currently there are ... 30-40 different web browsers" (5).

OR

However, "currently there are between 30-40 different web browsers"(Leshin 5).

OR

Still, we need to remember that there are about 30 to 40 different web browsers (Leshin 5).

SITUATION: (APA Citation)

Report to potential Internet users re: the multiplicity of search engines available to Internet users

Cynthia Leshin:
"Currently there are between 30-40(*sic*) different Web browsers." p. 5, *Internet Investigations In Business Communication*, 1997, Prentice-Hall Inc., New Jersey

Task: fit the above quote into a sentence and cite the source of the quote in a textual note.

However, Cynthia Leshin says that "currently there are ... 30-40 different web browsers" (1997, p.5).

OR

However, "currently there are between 30 and 40 different web browsers"(Leshin, 1997, p. 5).

OR

Still, we need to remember that there are about 30 to 40 different web browsers (Leshin, 1997, p. 5).

SUMMARIES ON THE JOB

- **meeting minutes**
- **short progress report**
- **technical information for fellow workers**
- **information for supervisor,**
  either in place of longer report,
  or in addition to longer report
- **information and/or analysis for clients,**
  or for the general public

THE SUMMARY PROCESS

1. Read the entire original

2. Reread and underline

3. Edit the underlined data

4. Rewrite in your words

5. Edit your version

6. Check your version against the original

7. Ensure your edited version reads smoothly

8. Document your source

PARAGRAPH DEVELOPMENT

General-to Specific

- description (spatial/sense details) (233)
- statement + illustration
- statement + detailed evidence or arguments i.e. *emphatic* sequence (235)
- extended definition
- classification
- comparison/contrast
  - i. point-by-point (235)
  - ii. block (236)
  - iii. analogy
- cause-effect analysis (234)

Specific-to-General

- effects-to-cause analysis (234)

Chronological

- problem-causes-solution sequence (235)
- narration: past tense
- process: present tense (230)
- instructions: present tense (233)

SPECIFIC-TO GENERAL:

The following paragraph demonstrates how a given action has had a desired effect

When we used Gabion baskets to retain the 2:1 banks of Tumbledown Creek below LeBihan Falls, we were surprised by the results. First, the baskets retained their geometric shapes despite the heavy aggregate which filled them. Also, because we placed geotextile fabric beneath the Gabion structure, the strong 2000 spring runoff didn't scour or undercut the Gabion system. Overall, the entire system remained intact and stable despite the powerful erosive conditions which ran from early March to late May.

PARAGRAPH COHERENCE

- **Use an appropriate sequence**
- **Use transitions**
- **Use pronouns for coherence**
- **Use deliberate repetition**
- **Use parallel structure**

See example, p. 231, Klepp &Lannon

PARAGRAPH UNITY

- **Start with central statement, a.k.a. the "topic sentence"**
  see Klepp and Lannon, p.229

- **Then, relate all details to this central statement**

- **Make paragraphs short to keep central idea clear**
  reports: 100 words or less (avg.)
  letters/memos: 60 word average

VARIATIONS:

- ***Indirect approach*: T.S. comes last**
- ***Delayed approach*: transitional sentence before T.S.**
- ***Pivoting approach*: negative or contrasting statement precedes T.S.**

SPECIAL HINT: Where appropriate, use lists preceded by topic identifiers

EMPHASIZE KEY POINTS

Place key phrase first: (sent. 1, par. 1 , p. 533: *"Short reports form the bulk of writing..."*)

Repeat key word(s): (see repetition of the word, "confidence", pages 640 and 641)

Change sentence length:

Our estimated completion date for the first phase of the project was inaccurate because of two factors we couldn't predict. First, the workers at Milne Construction went on a six-day strike in early April. Then, the weather in the last two weeks of April was unseasonably wet: the 144 mm of rain in that period meant that we couldn't move the equipment 12 out of 15 days. Such problems can't be predicted.

Use passive voice to emphasize recipient:

The completion dates were estimated by our project design team.

Use active voice to emphasize agent:

Our project design team estimated the completion dates.

1ST PERSON v.s. 3RD PERSON

EXECUTIVE SUMMARY

The proposed development of site DL 453 Plan 234 Sec. 4 next to Willow Creek must meet all Provincial and Municipal guidelines for erosion and sediment control as well as approval from a Department of Fisheries Officer. In this report, we have outlined all the necessary measures that Glendale Developments will need to follow to develop this site, including the design of a storm water system.

In brief, our recommendations according to land development guidelines are as follows:

EXECUTIVE SUMMARY

The proposed development of site DL 453 Plan 234 Sec. 4 next to Willow Creek must meet all Provincial and Municipal guidelines for erosion and sediment control. As well, it must be approved by a Department of Fisheries Officer. This report outlines all the necessary measures the Glendale Developments will need to follow to develop this site, including the design of a storm water system.

In brief, land development guidelines have led to the following recommendations:

KLEPP CLARITY INDEX

1. **Purpose/audience**

2. **Sufficient information?** **Necessary analysis and recommendations included?**

3. **Point of view:** detached? ____ involved? ____ appropriate? ____

4. **Overall structure:** clear? ____ suits the subject and purpose of this document? ____

5. **Paragraphs:** clear topic sentences? ____ one subject per paragraph? ____ effective transitions? ____ suitable development? _____ avg. length _____

6. **Strong, emphatic phrasing:**
   - has the writer used the active voice wherever possible?
   - has the writer placed the action in active verbs, rather than in nouns, adverbs, or objects? (Note: avoid words ending in "ance", "ion", "ment", or "ing".)
   - which of the following methods of emphasizing key points has the writer used?

   placing key phrases first ____ repeating key words ____ changing sentence lengths to draw attention to a key sentence ____ using the passive voice to emphasize the recipient of the action ____ using the active voice to emphasize the agent of the action or the action itself ____
   - has the passive voice been used to avoid responsibility?

7. **Clarity/conciseness**

   <u>vocabulary</u>
   - are specific words used where required?
   - any unnecessary jargon?
   - any examples of pompous phrasing?
   - any examples of wordiness?
   - is the repetition necessary?

   <u>grammar</u>
   - do subjects and verbs agree?
   - do pronouns agree with their antecedents?
   - are there run-on sentences (comma splices or fused sentences)?
   - do any sentences lack parallelism?

   <u>readable sentences</u>
   - no. of sentences ____ avg. sentence length ____
   - no. using SVO order ____ no. using SVC order ____
   - avg. no. of words before subject ___ avg. no. of words between subject and verb ___
   - percentage of linking verbs ____

   <u>Fog Index</u>

   average sentence length _____
   + pct. of 3-syllable words _____
   Total: _____ X .4 = _____

8. **Format and appearance**
   - format appropriate? ____
   - lists used where appropriate? ____
   - open space used effectively? ____
   - font and font size appropriate?
   - headings appropriate?

GUNNING-MUELLER FOG INDEX

Pick a passage, of about 100 words; the passage must contain complete sentences.

1. **Total words:_____**
2. **No. of sentences _____**
3. **Avg. sentence length: _____**
4. **No. of "big" words (3 syllables+) : ____**
5. **Percentage. of "big" words: _____ %**
6. **Calculation:**

avg. sentence length:_____

+ pctage "big" words: _____

Total: ____ X .4 = _____

FOG INDEX

Sample Fog Index Levels:

T.V. Guide	**6**
New Testament	**9**
Wall Street Journal	**11**
Newsweek*/*Time	**11**
Maclean's	**13**

Notes:

- **distinguish between reader comfort level and reader capability level**
- **shorter words may not be more familiar to reader**

WHY GRAPHIC ILLUSTRATIONS?

Visual concepts

- help introduce detail
- illustrate or reinforce verbal message
- are needed for full understanding — words and pictures work together
- enrich verbal material
- save space
- present concepts to all levels of audience
- display trends, relationships, summaries

USAGE HINTS

- **Use graphics wherever feasible**
- **Integrate illustrations with text**
- **Keep graphs and tables as simple as possible**
- **Choose the appropriate type of graph**
- **Keep graphs as simple as possible**
- **Document sources and modifications**
- **Consider using graphs and tables in concert**
- **Finish in ink, or print on laser printer (or similar)**

SECTION HEADING (16 pt.)

In formal reports, always center section headings at the top of a new page. Use a type size roughly 4 points larger than body copy (say, 16-point section heads for 12-point body copy). Avoid *overly* large heads, and use no other highlights. Fully capitalize the heading. (Some documents use color for section headings and capitalize just the first letter of each word.) Leave a full line space above the following text (as in this example). In most cases, use the same font for heads as for the text.

Major Topic Heading (14 pt.)

Place major topic headings at the left margin (flush left), and begin each word with an uppercase letter. Use a type size roughly 2 points larger than body copy, with no other highlights. Start the copy immediately below the heading (as shown), or leave one space below the heading.

Minor topic heading (12 pt.)

Indent minor topic headings. Use boldface and the same type size as the body copy, with no other highlights. Start the copy immediately below the heading (as shown), or leave one space below the heading.

subtopic heading. (12 pt.) Incorporate subtopic headings into the body copy they head. Place subtopic heads flush left and set them off with a period. Use boldface and the same type size as in the body copy, with no other highlights.

1. ***alternate subtopic heading***. If numbering is appropriate, place the subtopics in a list, with the numbers flush left and the body copy indented. Use italics *and* boldface if you want to draw particular attention to this fourth level of heading.

- **bulleted variation.** When the sequence of items in a list is not important, use bullets to precede the indented subtopic headings.

Figure 13.4 Recommended Headings Format

KINDS OF DESCRIPTIVE WRITING

- **Place**
- **Mechanism, product, object**
- **Process description**
- **Instructions**
- **Procedures**
- **Manuals: installation, maintenance, repair, operation, software documentation**
- **Specifications**
- **Bids and tenders**
- **Technical narratives: incident reports, field trip reports, inspections, periodic progress reports, maintenance reports, warranty claims**

PROCEDURES

- **usually involve more than one person**
- **not detailed instructions - the workers know their own jobs, but not the "big picture"**
- **a procedure coordinates the efforts of skilled workers**

Example: maintenance procedures are written, especially if the procedures are performed by different shifts (or revised when a procedure changes)

SPECIFICATIONS

- **Could be *prescriptive* - exact requirements are given**
- **Or *performance oriented* — the end result is prescribed**

NOTE: specifications use "shall" and "will" before verbs

SAMPLE PROCESS DESCRIPTION

How Entrained Air Helps Concrete Resist Damage

INTRODUCTION

- Definitions
- The problem: freeze-thaw cycle and deicers damage concrete (summary of that process)
- The solution: air-entrainment
- stages in the two halves of that solution:
  - how air is entrained
  - how it helps concrete resist damage

HOW AIR IS ENTRAINED

Adding Air Entrainment Agents

The Mixing Action

The Resulting Pattern In Concrete

HOW ENTRAINED AIR HELPS RESIST DAMAGE

Resisting The Freeze-Thaw Cycle
- **Factor 1 (or, stage 1)**
- **Factor 2 (or, stage 2)**
- **etc.**

Protecting Against Deicers
- **Factor 1 (or, stage 1)**
- **Factor 2 (or, stage 2)**
- **etc.**

CONCLUSION

PROCESS ANALYSIS

PURPOSE	Helps reader understand how and why the process occurs
AUDIENCE	Reader wants to understand how something works or how it happens
CONTENT	*Explanations* are essential, in addition to straight *chronological description* of the process's stages. Description of process's *physical environment* is part of some descriptions. *Illustrations* are often very useful. Descriptions are *specific* and *detailed*.
STRUCTURE	*General idea* (lead-in) ♦ names and defines process and its special features ♦ where, when, why, how often the process occurs ♦ where necessary, gives background theory ♦ lists the process's main stages or actions *Individual stages* (chronological) ♦ each stage is described in detail and related to the stages which precede and follow; the importance of particularly important stages is noted ♦ each stage includes applicable measurements of time, distance, direction, density, volume, etc. *Conclusion* (lead out to practical considerations) ♦ where applicable, comments about time needed for overall process, cost, process's applications, special problems, immediate and long-term results
VOICE/MOOD	Uses indicative mood ("the next stage takes three hours…") Stays detached, in 3rd person ("the skier's first move…") Active <u>or</u> passive voice ("the signal travels…" or, "the signal is next transferred to the filtering stage…")
APPEARANCE AND STYLE	Usually looks formal (headings, paragraphs, standard spacing) Reads like a "serious" discussion Uses a mixture of sentence types and lengths. Uses precise, accurate vocabulary

INSTRUCTIONS

Helps the reader perform the process that is described	**PURPOSE**
Aimed at persons who need to complete a task or want to improve performance	**AUDIENCE**
Provides no more detail than is necessary (Note: analysis and explanations may be necessary.) Features a very careful *chronological listing of steps* Very carefully describes *exact steps* to take Includes *frequent visual illustrations*	**CONTENT**
Introduction ♦ concisely explains the overall actions to be performed ♦ in some cases, provides background information and, where necessary, lists materials/equipment to be used or the conditions necessary for successful action ♦ in some cases, cautions reader about safety factors *Chronological list of steps* (plus necessary explanations) ♦ where appropriate, combines groups of steps together under sub-headings ("Setting the timer", "Selecting programs") ♦ shows the interrelations and sequence of actions by using numbered steps and sequence transitions ("next", "then", "10 minutes later," "after the liquid cools") ♦ gives reasons for doing performing certain actions in a specific way or at a specific time ♦ uses illustrations to show the *results* of actions, not just the techniques for performing the actions *Brief practical conclusion* ♦ reminds the reader of expected results/performance times	**STRUCTURE**
Uses imperative mood ("Set the timer by choosing…") Directly addresses reader ("Your first task will be to…") Uses active voice ("Choose one of three settings…")	**VOICE/MOOD**
Uses some paragraphs, but mostly uses numbered point form Looks "user friendly" Writes in phrases or short sentences Features direct, straightforward vocabulary Employs lots of open space	**APPEARANCE AND STYLE**

CLEAR INSTRUCTIONS

- **Clear And Limiting Title**
- **Logically Ordered Steps**
- **Visuals**
- **Appropriate level of technicality**
  1. **background info where necessary**
  2. **detailed explanations**
  3. **examples**
- **Warnings, cautions, and notes**
- **Appropriate words, sentences, paragraphs**
  1. **active voice and imperative mood**
  2. **transitional words - time and sequence**
  3. **parallel phrasing**
  4. **carefully shaped paragraphs and sentences**
  5. **accessible format**

MORE HINTS

- **Use lots of "white space"**

- **Use pictures or graphs to show the results, as well as how to achieve those results**
- **Use words to explain those illustrations**

- **Keep paragraphs very short**
- **Use point form**
- **Use headings to show "natural" divisions**

- **Put lengthy explanations (more than 3 or 4 lines) in boxes**

- **Use fonts wisely:**
    1. **minimize font changes**
    2. **bold, or italicize, or change font size before changing font type**
    3. **use strong serif fonts:**

(Times New Roman,
Garnet, Boston,
Fritz, Palatino)

PROPOSAL STRUCTURES

INFORMAL	FULL FORMAL
Introduction: reader connection/purpose of letter or memo + brief summary	Transmittal document
	Project summary
Background & problem + lead-in to solution	Title page Tables of contents & figures
Project description (nature of proposed solution) * overview of work: scope and methods * task breakdown * time and work schedule	Project description * introduction * rationale & significance * background of problem * need for solution * benefits of solution * feasibility of solution
Rationale: * arguments in favor of proposed solution * refutations of objections (if applicable)	Plan of the work * scope * methods to be used * task breakdown * time and work schedule * likelihood of success * products of the project
Facilities and equipment	Facilities and equipment
Personnel	Personnel (or, Staffing) * biographical data * past experience and qualifications of staff * previous clients/projects
Budget	Budget
Authorization	(Authorization)
Attachment/enclosure	Appendices

GRAPHICS IN PROPOSALS

The Message	The Graphic
We offer high performance at low cost	Line, bar, and pie charts Tables
Our plan is logical	Flow chart
Our system or equipment does the job	Schematic diagram Hybrid graphic (such as drawings, photos, and tabular data pasted onto a flow diagram)
The parts are easy to assemble	Exploded view drawing
We can meet the schedule	Timeline with milestones Critical path diagram
We have the resources and experience	Data charts Resumes with experience timelines Photos (people, facilities, and equipment)

Source: G. Edward Quimby, "Make Text and Graphics Work Together", Intercom, January 1996, p.34

REPORTER RESPONSIBILITY

1.Prime responsibility

- answer reader's question

2.Attendant responsibilities

- make report purpose clear
- use appropriate structure for that purpose
- discuss at an appropriate level; use appropriate language
- ensure report is readable (objective indexes)
- write ethically:
  admit data limitations;
  do not suppress contrary evidence
- forcefully make points:
  active verbs; active voice; appropriate graphs and other illustrations
- make report professional and error-free

TOPICAL HEADINGS vs TALKING HEADINGS

Introduction	**Let's get started or, First things first**
Background	**How we did last year**
Study method	**What We Studied**
Results	**What We Learned**
Conclusion	**The Bottom Line**
Recommendations	**What We Should Do**

Reader: very concerned about costs and bottom line

Introduction
History: Revenues VS Costs
Cost/Production Study
Results: Performance VS Costs
Conclusion
Recommendation

Reader: interested in performance improvements

Introduction
Present Equipment
Study: New Equipment
Performance Results
Conclusion
Recommendation

SUMMARY/ABSTRACT

Uses for "summary"

- **as separate section in body of report i.e., Factual Summary**
- **built into the report, at end of a section**
- **in *CONCLUSION***
- **in separate *SUMMARY* or *ABSTRACT***

Kinds of Abstracts

- **informative abstract**
  * called *ABSTRACT* or *SUMMARY*
  * gives objectives of research or report, methodology used, and findings (results and conclusions)
  * found separate from report, or in Front Matter
- **descriptive abstract**
  * usually called *ABSTRACT*
  * talks about the report, its methodology and purpose, but presents no findings
  * sometimes included with report; more often, found separate from report

NAMES OF SUMMARIES:

- ***Factual Summary***
- ***Informative Summary***
- ***Summary***
- ***Executive Summary***
- ***Synopsis***
- ***Technical Summary*** (similar to Informative Abstract in scientific circles)

MAIN PURPOSE:

provide the report's main findings and analyses in a brief, digested form

INTRODUCTION

Contains:

1. **The context or situation or problem prompting this report (background).**
2. **The type of data on which the report is based and the type of source.**
3. **The report's specific analytical purpose.**
4. **The approach used to fulfill that purpose (which criteria, which structure).**

An Introduction also indirectly sets the tone of the report.

Might also contain:

1. **Justification of the criteria used to analyze the data.**
2. **Other theoretical or background information pertinent to understanding the purpose and direction of the report.**
3. **Useful illustrations.**

CONCLUSION

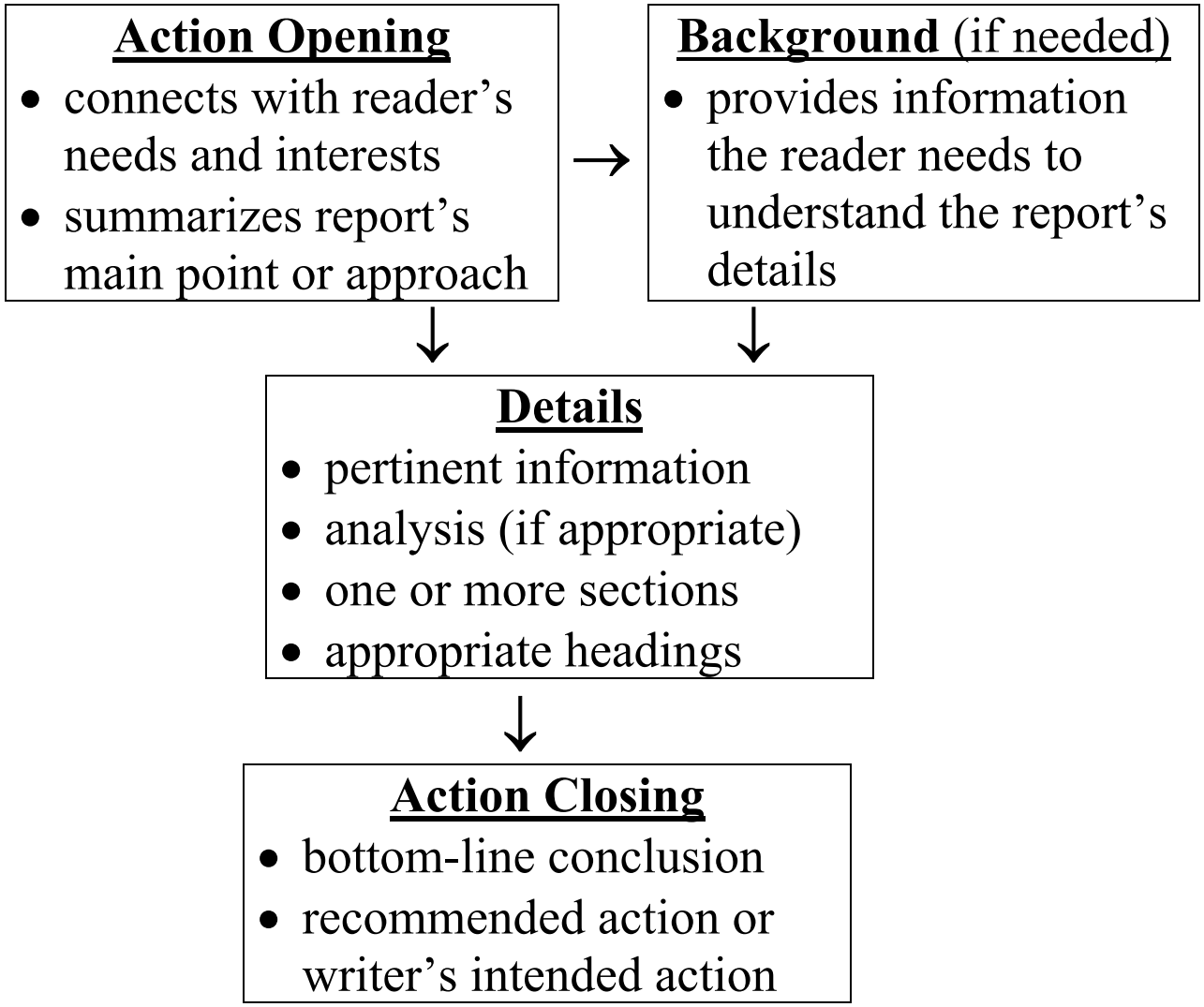
Could provide:

1. a summary of main findings and analyses
2. a consolidation and interpretation
3. recommendations
4. a combination of all three above

Must provide:

1. a lead out from the material, to place it in perspective
2. conclusions which are firmly based on information, ideas and analysis already presented in the report
   NO SURPRISES!
3. an honest and objective appraisal of the material

ACTION STRUCTURE FOR INFORMAL AND SEMI-FORMAL REPORTS



FORMAL AND SEMI-FORMAL REPORT FORMATS

	Formal	Semi-formal
Length	6 pages +	4-10 pages
Required Sections		
• Transmittal document	yes	optional
• Cover	optional	no
• Title page	yes	optional – title could be placed on first page of report body
• Summary	yes	no
• Table of contents	yes	optional
• List of illustrations	yes	optional
• Glossary	optional	incorporate into text
• Introduction	yes	yes
• Background	optional	optional
• Central analysis	one or more sections	one or more sections
• Conclusion	yes	yes
• Recommendations	optional	optional
• Sources cited	yes (if sources were cited)	optional
• Sources consulted	optional	optional

FORMAL AND SEMI-FORMAL REPORT FORMATS (continued)

Format and Appearance:		
• Headings system	formal; usually 3 or 4 levels; each main heading placed at the top of a page	more relaxed; seldom more than 2 levels of headings; main headings placed where they come on the page
• Page numbering	different for first page of a section than for subsequent pages in that section	all page numbers placed at same location on page
• Margins	top & bottom margins for first page of a section are larger than for subsequent pages	all pages use same margins layout
• Indentation	paragraphs not indented; double-space between paragraphs; bulleted and numbered lists may be indented	paragraphs not indented; double-space between paragraphs; bulleted and numbered lists may be indented
• Headers	optional, but headers appear in most professional reports	seldom used

INSPECTION REPORT STRUCTURE

Section	Reader Questions To Answer
Action opening	• why should I read this report? • what is the main result of the inspection?
Background	• why was this inspection conducted? • what was inspected? • who did the inspection? • when and where did the inspection occur?
Details	what did the inspection reveal? ① conditions found: what did the inspectors observe re: the quality of work performed or items provided at the site? In what condition were equipment, facilities, or materials? ② deficiencies: what conditions, if any, need to be corrected? Does any work need to be done or re-done?
Action closing	• overall, what is the state of the site (facilities, equipment, etc.)? • does the writer suggest specific actions?

INSPECTION MEMORANDUM
PrairiePOWER Corporation

DATE: January 7, 1998

TO: Randall Johnson, Gas & Electrical Inspections Coordinator

FROM: Miranda Ocala, Gas Inspector

RE: Clogged Masonry Chimney
at 322 Montcalm Crescent, Saskatoon

On the evening of January 3, an elderly member of the Smith family resident at 322 Montcalm Crescent was rushed to the U of S Hospital Emergency Department. An alert resident suspected CO poisoning and alerted SaskEnergy. Later that day, Melvin Trask of SaskEnergy advised the occupants of the two-story single family residence to vacate because:

- the chimney was blocked with ice
- CO concentrations of .02% were present apparently due to spillage of gas combustion products.

On January 4, Keith McLeod and I inspected the gas equipment and found:

- the masonry chimney was blocked with ice. (We noted a white lime-like substance on the exterior portion of the chimney, which is exposed in the garage.)
- the furnace and the water heater were spilling.
- the home had evidence of excessive moisture – the windows were frozen shut. A serviceman from Prairie Heating was present; he opened a small passageway at the top of the chimney's interior. Soon after a draft was established, (i.e., in 30 minutes), the ice began to melt.
- the gas equipment was in good condition. That equipment consists of
  1. a 137,000 BTUH std. Lennox furnace with a 6" vent draft hood
  2. a 36,000 John Wood water heater with draft hood (3" vent)

  Both operated satisfactorily as soon as the chimney passage was reasonably clear.
- the 1", two-outlet has supply pipe was in good condition

- the masonry chimney, which is constructed of bricks and concrete and lined with tile throughout, seemed in good condition, although our initial inspection was unable to confirm the chimney's interior condition because of the ice buildup.

On January 6, after the ice had thawed, our subsequent inspection revealed damaged tile liner around the vent connector's entry point. This defect, coupled with the exposure of all four sides of the chimney and the recent cold weather, seems to have led to the icing condition. There is evidence that severe icing has occurred before – there's white substance on the chimney exterior in the garage.

Because the tile liner measures 6 ¼ " by 6 ¼", and a flexible liner measures 6 3/8 " OD, I have approved use of traditional (shop made) sectional 6" aluminum liner. This is the most economical method of any acceptable corrections.

Still, the owner, Rod Smith, is annoyed that corrections are necessary to a house built just 14 years ago. He is also very angry that an owner's defect has been issued precluding occupancy until satisfactory corrections have been made. (He has threatened to sue for the costs of housing his family in a hotel until the residence is cleared for occupancy.) I suggest that our customer service people speak with Mr. Smith to explain all the ramifications of allowing a family to occupy a home with potential for CO-induced deaths.

Miranda Ocala

Miranda Ocala

TRIP REPORT STRUCTURE

Section	Reader Questions To Answer
Action opening	• why are you reporting this? (optional) • in brief, what have you been doing? what did you accomplish?
Background	• who went where? when? why? • on whose authority? (optional) • how did the writer travel? (optional) • what was the project? (optional)
Details of work accomplished	• what did you do? what routine work? which work specifications were followed? • what work did you perform beyond the routine requirements? • what did you observe? • what meetings, if any, did you have? with whom? what were the results?
Problems encountered	• what were the specific problems, if any? did you identify the causes of these problems? • what specific actions did you take to solve the problems? • were you successful? if not, why not?
Action closing	• what remains to be done? what resources are necessary? who should perform the work? have you assigned the work? • are you requesting support or authorization from me, your reader?

SHORT FEASIBILITY REPORT

Section	Content	Comments
Action opening	Refer to reader's request or the situation requiring analysis. State whether the examined project or equipment is feasible.	The reader connection might be placed in a transmittal document if a semi-formal format is used. A letter or memo will not need a heading for the opening.
Background	Describe the situation leading to this study. Explain exactly what kind of feasibility is studied and list the assessment criteria.	The amount of background will depend on the reader's familiarity with the subject. The criteria may have to be justified.
Details of assessment	Apply each assessment criterion, step by step, to the data. Choose suitable criteria - a proposed equipment purchase, for example, could look at equipment reliability, warranty, performance, cost, and compatibility with current equipment.	The title of this section will depend on the kind of feasibility being discussed, and on the reader's priorities.
Action closing	Summarize the results of applying all criteria and state the bottom-line conclusion. If appropriate, recommend approval.	A summary table might be effective. Brochures, test data, financial projections, or other detailed supporting data might be attached.

Ministry of Transportation _____Internal Memo

DATE: 10 April 1999

TO: Richard Janvier, Information Systems Coordinator

FROM: Grant Perkins, Science and Technical Officer

RE: Sand and Glavine Proposal For Office Networking (RFP 19970219-EIS)

As you requested, this report assesses the proposal submitted by Sand and Glavine Systems for an office network for our Vernon Engineering Services office. The proposal has merit, but requires changes before the Ministry of Transportation can accept it.

The RFP placed its focus on making better use of the computer information systems by creating a local area network (LAN). Therefore, I used the following criteria to assess the Sand and Glavine computer network proposal:

- Technical considerations
- Cost
- Training and support.
- Efficiency gains

Information for the assessment was collected from current books on the subject, staff at the Vernon Engineering office, and local businesses.

Technical Considerations and Cost

The proposed network will meet Engineering Information Systems requirements, with minor changes. (In particular, the Wang 286 needs to be retained as part of the network. See the attached technical analysis for more detail.) These changes put the cost of the network slightly over budget. However, anticipated reductions in cable requirements and installation time should lower the cost. The overall cost of the modified network will be close to the proposal's quoted price of $4000.

Training and Support
Technically, the Sand and Glavine Systems proposed network is simple. Because of this simplicity, and the competence of the staff at the Vernon Engineering Office, the proposed training will be sufficient. Unlike training, support was not included in the proposal's quoted price. It was offered at additional cost through monthly service contracts. The Ministry of Transportation has qualified computer support personnel on staff. Purchasing support from Sand and Glavine Systems would duplicate service and add to the direct cost of this network.

Efficiency Gains
Sand and Glavine's proposed computer network will meet Engineering Service's objective of increasing the efficiency of its Vernon office. The network will save time and allow staff to focus their efforts on engineering rather than on file management. Also, Sand and Glavine will install the system on a weekend, saving two days of down time.

Recommendation
If Sand and Glavine Systems re-submits the proposal with the requested changes, it should be adopted.

Grant Perkins

Grant Perkins

Attachments: Technical analysis (cable, topology, hardware, and software)
Cost analysis
Task time comparisons

INFORMAL OR SEMI-FORMAL CAUSAL ANALYSIS

Section	Content	Comments
Action opening	Refer to the reader's request or to the writer's role in analyzing the identified situation. State whether the cause(s) can be identified and, if so, name the main cause.	The reader connection might be placed in a transmittal letter or memo if a semi-formal format is used. A letter or memo report will not need a heading for the opening paragraph or two.
Background	Describe the situation (or environment) in which the event occurred or in which the problem developed. Provide background about similar problems or situations.	This section should not exceed two paragraphs. If more detail is necessary, it can be placed as attachments.
Details of analysis	Describe the step-by-step analytical process and give the results of that process.	Causal analysis usually names possible causes identified from previous experience and based on the relation between an event and prior conditions. See Chapter 7 re: correlation and causation.
Action closing	Summarize the report's main findings. State the bottom line. If appropriate, recommend remedial or preventative action.	A summary table might be effective. Attached brochures, performance tests, financial projections, or other detailed supporting data might be appropriate.

RECOMMENDATIONS REPORT
(direct pattern)

Recommendations

- **briefly state how to solve the problem identified in the subject line**

Background

- **discuss problem and its cause(s)**
- **explain how the recommended solution will work**

Benefits

- **describe benefits of the recommended solution**
- **look at advantages and disadvantages**
- **examine costs**

Conclusion

- **state recommended action: implementation method**

Notes:
- **"connect" with reader in opening sentence**
- **use talking headings**
- **attach, enclose, or append useful background data**

RECOMMENDATIONS REPORT
(indirect pattern)

Introduction

- state purpose of report (and "connect" with reader)
- preview report organization

Background

- discuss problem and its causes
- list criteria for assessing solutions
- explain how criteria will be applied, and why

Assessment

- briefly describe possible solutions
- use criteria to assess each solution, category by category

Conclusion And Recommendations

- summarize assessment
- give bottom line: the best solution (or combination of solutions)
- explain method of implementing "best solution"

Notes:
- "connect" with reader in first sentence
- use a good will closing
- use topical or talking headings

DIRECT PATTERN FOR RECOMMENDATIONS REPORT

COMBATTING MACRO VIRUSES IN OUC LANs

Recommendations

Overview of recommended solution and action steps

Introduction

Nature of problem
Causes + summary of process used to determine them
Overview of proposed solutions
Criteria for evaluating each solution:
- cost
- probability of long-term success
- ease of implementation

Evaluation

Install new anti-virus software
- Cost
- Prediction re: success
- Ease of installation
- Evaluation

Educate and train all lab users
- Cost
- Prediction re: success
- Ease of implementation
- Evaluation

Conclusions

- Preferred solution
- Full numbered list of implementation steps

DIRECT PATTERN WITH
TALKING HEADINGS

COMBATTING MACRO VIRUSES IN OUC LANs

How To Combat The Viruses
- Overview of recommended solution and action steps

How We Chose The Solution
- Nature of problem
- Causes + summary of process used to determine them
- Overview of proposed solutions
- Criteria for evaluating each solution:
  - cost
  - probability of long-term success
  - ease of implementation

Evaluating The Options
- Install new anti-virus software
  - Cost
  - Will it work?
  - Is it easy to install?
  - Evaluation
- Educate and train all lab users
  - Cost
  - Will it work?
  - Is it easy to install?
  - Evaluation

Which Is Best?
- Preferred solution
- How to make it work

INDIRECT PATTERN FOR RECOMMENDATIONS REPORT

COMBATTING MACRO VIRUSES IN OUC LANs

Introduction

- Nature of problem
- Causes + summary of process used to determine them
- Overview of proposed solutions
- Criteria for evaluating each solution:
  - cost
  - probability of long-term success
  - ease of implementation

Evaluation

- Install new anti-virus software
  - Cost
  - Prediction re: success
  - Ease of installation
  - Evaluation
- Educate and train all lab users
  - Cost
  - Prediction re: success
  - Ease of implementation
  - Evaluation

Conclusions

- Comparative summary (table)
- Preferred solution

Recommendations

- Overview of recommended solution and full numbered list of implementation steps

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SIMPLIFIED FORMAT

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Signature
____
Writer's Name

SAMPLE REQUEST

MEMO Magnum Mine Machinery

DATE: 23 June 1999

TO: Kordell Dobson, General Sales Manager

FROM: Marc Bessier, Sales Representative **MB**

RE: Company Web Site

In Monday's monthly sales meeting you mentioned the possibility of using e-commerce as a way of building our market base. Recent developments in my sales territory reinforce the need to establish a company Web site as a first step toward e-commerce.

Background

My territory primarily consists of mining operations in northern Ontario and northern Manitoba. Because many of the mines are quite remote, they use the Internet to keep in touch with the world and to shop for equipment and supplies. I've been using the mail, phone calls, and fax messages to send product information and answer their enquiries, but I'm on the road 7 days out of 10, so it's difficult for me to respond promptly.

Several purchasing officers have told me that they'd prefer to go to the Internet for product information, prices, and availability. And they'd like to order on the Net, too.

Action Required

Our chief competitor, Allan-Price, has set up a home page. There's not much on it right now, and it's not very well organized, but Allan-Price has a presence on the Web, as Marco Corrazini of Canway's Musquean Mine pointedly told me on the phone yesterday. I think we have to keep up with Allan-Price.

What will establishing a Web site require? I called a friend at Merced Industrial Machines to learn how his company set up its top-quality site. He told me that some of the Merced head office people had computer experience, so they tried to do the work themselves. In the end, though,

they had to call in a consultant, who charged about $5,000 to design and build the site. In addition, Merced purchased about $1500 worth of software. And it continues to pay a part-time Webmaster $400 per month to update and troubleshoot the site.

I contacted that same consultant, June Paschke, yesterday. She has three years experience as a Web page designer. She said that building a site for us would take a bout the same amount of time (10 working days) and cost about the same as the Merced contract. Of course, she would have to meet with us before presenting a detailed proposal of her work plan and fees.

Authorization

May I arrange a meeting next Monday for June Paschke to discuss our needs and her solutions with you, me, and our other three regional sales representatives? We'll all be in town for the AGM. Also, may I meet with you to discuss my possible involvement in the project? I have a special interest in a Web site project because of its potential for building business. I'll be in Cochrane and Kapuskasing for the next two days, but I'll check frequently for messages on my pager, 689-4352.

APPLICATION LETTER

Introduction

* apply for the position, *by name*
* indicate how you learned about it

Sales Pitch

* show how your *combination* of abilities, personal attributes, skills, training, and education will help you do their job well
* refer to resume for specific detailed evidence
* show that you understand the position's requirements
* some aspect of your unique personality must shine through

Closing

* refer to interview and when you're available for an interview
* say when you're available for work
* tell how and *when* you can be contacted
* close on a strong note: perhaps why you want this position, or why you're qualified

ENQUIRY LETTER

- the challenge and how to meet it
- structure
    - * summary
    - * details of enquiry
    - * business closing
- hints
    - * use word list
    - * follow logical order of questions
    - * ask reasonable number of questions
    - * make questions absolutely clear
    - * use appropriate tone and phrasing: positive, assertive, polite, concise and business-like, fresh(no clichés), energetic (active verbs)
    - * make it easy for the reader to respond
    - * where feasible, follow-up by phone or personal visit
    - * if possible, promise a reward
    - * **display the "you" attitude**

CAREER ORIENTATIONS

1. Getting ahead
2. Getting rich
3. Getting secure
4. Getting control
5. Getting high
6. Getting balanced
7.
8.

THE NEW WORKER

1. ***Independent thinkers:*** want to build own work; impatient with corporate norms; not loyal to company; detest endless meetings
2. ***Lifestylers:*** "I work to live, not live to work"; balance of work & career
3. ***Personal developers:*** identify with work, not with employer; need challenges; will take career risks if they thus develop new skills
4. ***Careerists:*** ambitious; aspire to management role; motivated by prestige and status
5. ***Authenticity seekers:*** "I gotta be me." resist conformity to corporate norms, but can be creative
6. ***Collegiality seekers:*** must belong to team; derive identity from group

Source: Barbara Moses, Globe And Mail, p.B15, Nov. 10, '98

INTRODUCTION LETTER

Purposes:

1. introduce your"presence"
2. position yourself in reader's mind
3. perhaps meet the reader/employer

Content/structure:

1. minimum sales pitch
2. refer to resume
3. ask for meeting or other response
4. 3-part structure:
   - opening summary & self-intro
   - refer to resume + brief positioning statement
   - closing call for action

Phrasing:

1. "you"-centered
2. relatively brief
3. opening: positive, but not overdone

SELF-INVENTORY

Apparent to Audience	Subtle or Not Obvious
1. Strengths	**2. Strengths**
3. Limitations	**4. Limitations**

SNAPSHOT RÉSUMÉ

Basic contact information

Jim Landon

Box 309 Hudson Bay, Saskatchewan
S0D 3T4
Phone: (306) 334-7429

Names positions, but doesn't restrict his chances

Preferred Position

Production line worker, loader, or yard worker in sawmill or plywood mill

Quick summary of relevant experience

Experience

20 years at Simpson Timber, Hudson Bay (Mill to close this summer.) Have performed all sawmill production jobs.

Shows potential for adapting to a variety of positions

Expert in sorting and grading lumber.
Skilled with wide variety of power tools and equipment.

Personal Characteristics

Hard working and conscientious. Loyal.
Eager to earn living for family of four.

Suggests high level of motivation

Will relocate. Willing to work any hours.

KINDS OF JOB INTERVIEW QUESTIONS

Informational

- Tell me about your background
- What kinds of things did you learn at college?

High Risk

- Why did you leave that job?
- What kinds of things upset you at work?
- What are your limitations?
- Do you like working with others, or do you prefer to work on your own?
- What did you think of your program at college?

Opportunity

- What are your strengths?
- Where do you want to be in five years?
- Why should I hire you?
- Why do you like this line of work?
- Why did you choose your program of study at college?
- Tell me a story