LEARNER GUIDE

Present Information in Report Format

Unit Standard 110023

Level 4 Credits 6

TABLE OF CONTENTS

PERSONAL INFORMATION

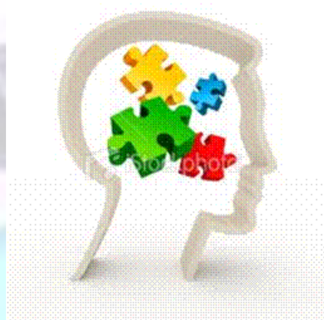
NAME	
CONTACT ADDRESS	
Code	
Telephone (H)	
Telephone (W)	
Cellular	
Learner Number	
Identity Number	

EMPLOYER	
EMPLOYER CONTACT ADDRESS	
Code	
Supervisor Name	
Supervisor Contact Address	
Code	
Telephone (H)	
Telephone (W)	
Cellular	

INTRODUCTION

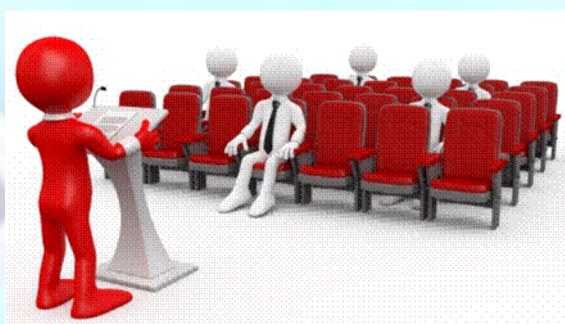
Welcome to the learning programme

Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take notes and share information with your colleagues. Important and relevant information and skills are transferred by sharing!



This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!

Programme methodology



The programme methodology includes facilitator presentations, readings, individual activities, group discussions and skill application exercises.

Know what you want to get out of the programme from the beginning and start applying your new skills immediately. Participate as much as possible so that the learning will be interactive and stimulating.

The following principles were applied in designing the course:

- ✓ Because the course is designed to maximise interactive learning, you are encouraged and required to participate fully during the group exercises

- ✓ As a learner you will be presented with numerous problems and will be required to fully apply your mind to finding solutions to problems before being presented with the course presenter's solutions to the problems
- ✓ Through participation and interaction the learners can learn as much from each other as they do from the course presenter
- ✓ Although learners attending the course may have varied degrees of experience in the subject matter, the course is designed to ensure that all delegates complete the course with the same level of understanding
- ✓ Because reflection forms an important component of adult learning, some learning resources will be followed by a self-assessment which is designed so that the learner will reflect on the material just completed.

This approach to course construction will ensure that learners first apply their minds to finding solutions to problems before the answers are provided, which will then maximise the learning process which is further strengthened by reflecting on the material covered by means of the self-assessments.

Different role players in delivery process

- ✓ Learner
- ✓ Facilitator
- ✓ Assessor
- ✓ Moderator

What Learning Material you should have

This learning material has also been designed to provide the learner with a comprehensive reference guide.

It is important that you take responsibility for your own learning process; this includes taking care of your learner material. You should at all times have the following material with you:

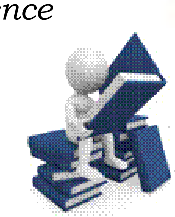
Learner Guide 	*This learner guide is your valuable possession:* This is your textbook and reference material, which provides you with all the information you will require to meet the exit level outcomes. During contact sessions, your facilitator will use this guide and will facilitate the learning process. During contact sessions a variety of activities will assist you to gain knowledge and skills. Follow along in the guide as the training practitioner takes you through the material. Make notes and sketches that will help you to understand and remember what you have learnt. Take and share information with your colleagues. Important and relevant information and skills are transferred

	by sharing! This learning programme is divided into sections. Each section is preceded by a description of the required outcomes and assessment criteria as contained in the unit standards specified by the South African Qualifications Authority. These descriptions will define what you have to know and be able to do in order to be awarded the credits attached to this learning programme. These credits are regarded as building blocks towards achieving a National Qualification upon successful assessment and can never be taken away from you!
Formative Assessment Workbook 	The Formative Assessment Workbook supports the Learner Guide and assists you in applying what you have learnt. The formative assessment workbook contains classroom activities that you have to complete in the classroom, during contact sessions either in groups or individually. You are required to complete all activities in the Formative Assessment Workbook. The facilitator will assist, lead and coach you through the process. These activities ensure that you understand the content of the material and that you get an opportunity to test your understanding.

Different types of activities you can expect

To accommodate your learning preferences, a variety of different types of activities are included in the formative and summative assessments. They will assist you to achieve the outcomes (correct results) and should guide you through the learning process, making learning a positive and pleasant experience.

The table below provides you with more information related to the types of activities.

Types of Activities	*Description*	*Purpose*
Knowledge Activities 	You are required to complete these activities on your own.	These activities normally test your understanding and ability to apply the information.
Skills Application Activities 	You need to complete these activities in the workplace	These activities require you to apply the knowledge and skills gained in the workplace
Natural Occurring Evidence 	You need to collect information and samples of documents from the workplace.	These activities ensure you get the opportunity to learn from experts in the industry. Collecting examples demonstrates how to implement knowledge and skills in a practical way

Learner Administration

Attendance Register

You are required to sign the Attendance Register every day you attend training sessions facilitated by a facilitator.

Programme Evaluation Form

On completion you will be supplied with a "Learning programme Evaluation Form". You are required to evaluate your experience in attending the programme.

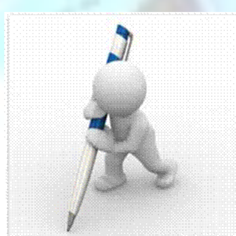
Please complete the form at the end of the programme, as this will assist us in improving our service and programme material. Your assistance is highly appreciated.

Assessments

The only way to establish whether a learner is competent and has accomplished the specific outcomes is through the assessment process. Assessment involves collecting and interpreting evidence about the learners' ability to perform a task.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

This programme has been aligned to registered unit standards. You will be assessed against the outcomes as stipulated in the unit standard by completing assessments and by compiling a portfolio of evidence that provides proof of your ability to apply the learning to your work situation.



How will Assessments commence?

Formative Assessments

The assessment process is easy to follow. You will be guided by the Facilitator. Your responsibility is to complete all the activities in the Formative Assessment Workbook and submit it to your facilitator.

Summative Assessments

You will be required to complete a series of summative assessments. The Summative Assessment Guide will assist you in identifying the evidence required for final assessment purposes. You will be required to complete these activities on your own time, using real life projects in your workplace or business environment in preparing evidence for your Portfolio of Evidence. Your Facilitator will provide more details in this regard.

To qualify and receive credits towards your qualification, a registered Assessor will conduct an evaluation and assessment of your portfolio of evidence and competency.

Learner Support

The responsibility of learning rests with you, so be proactive and ask questions and seek assistance and help from your facilitator, if required.

Please remember that this Skills Programme is based on outcomes based education principles which implies the following:

- ✓ You are responsible for your own learning – make sure you manage your study, research and workplace time effectively.
- ✓ Learning activities are learner driven – make sure you use the Learner Guide and Formative Assessment Workbook in the manner intended, and are familiar with the workplace requirements.
- ✓ The Facilitator is there to reasonably assist you during contact, practical and workplace time for this programme – make sure that you have his/her contact details.
- ✓ You are responsible for the safekeeping of your completed Formative Assessment Workbook and Workplace Guide
- ✓ If you need assistance please contact your facilitator who will gladly assist you.

- ✓ If you have any special needs please inform the facilitator

Learner Expectations

Please prepare the following information. You will then be asked to introduce yourself to the instructor as well as your fellow learners

Your name:
The organisation you represent:
Your position in organisation:
What do you hope to achieve by attending this course / what are your course expectations?

Unit Standard 110023

Unit Standard Title

Present information in report format

Unit Standard ID

10023

NQF Level

4

Credits

6

Purpose

This Unit standard is intended for all persons working in administration in commercial and non-commercial organisations and who is responsible for presenting information in report format.

A learner accredited with this standard will also be able to plan and allocate the resources required to maximise efficiencies in an office environment whilst minimising resource costs in achieving stated objectives.

Learning assumed to be in place

Learners should be competent in:

- Communication at NQF Level 3
- Mathematical Literacy at NQF Level 3
- Computer Literacy at NQF Level 3.

Unit standard range

Listing of Reports is limited to five and compiling of Reports is limited to three for purposes of assessment because of time constraints.

Specific Outcomes and Assessment Criteria

Specific Outcome 1: Relate the purpose, content, form, frequency and recipients of a range of reports to the information needs of a selected business. Assessment is limited to five reports

Assessment Criteria

- ✓ The regular reports are identified for a selected organisation
- ✓ The information needs of the organisation are linked to the purpose of each identified report

- ✓ A template is drawn up for each report in the company specific format including the mandatory content headings
- ✓ A table is created listing each report, its purpose, the regular recipients and frequency of distribution

Specific Outcome 2: Identify information sources and organisational procedures for obtaining and distributing information relevant to a selected business function

Assessment Criteria

- ✓ A table is created listing each report and the information sources required for input to the report. The information sources are linked to specific headings within the report
- ✓ A table is drawn up listing each information source, from whom it is obtainable, when it is available, its level of confidentiality, and to whom it should be returned
- ✓ Company procedures for obtaining information sources are identified for each information source and linked to the table above.

Specific Outcome 3: Compile reports related to a selected business function, ensuring content and format are appropriate to information requirements and that reporting deadlines are met

Assessment Criteria

- ✓ The identified reports are compiled using current information. Assessment limited to three reports
- ✓ The created templates are used to write the reports and any necessary modifications are made and noted, to ensure compliance with business requirements
- ✓ The identified information sources are used to provide the information required by the organisation
- ✓ The report is distributed in the required manner in time to meet the specified deadline. (e-mail, postage, internal mail, courier, and delivery)

Specific Outcome 4: Liaise with relevant parties and verify that reported information is in accordance with requirements and purpose of the report

Assessment Criteria

- ✓ A table is compiled listing each of the relevant recipients of the reports, a space for comments and an overall rating of the report in terms of whether it meets their information requirements and purpose
- ✓ The form is distributed to recipients and their comments evaluated to determine useful of report
- ✓ Possible amendments to reports are made in line with suggestions from recipients

Unit Standard Essential Embedded Knowledge

None stated

Critical Cross-field Outcomes (CCFO)

Unit Standard CCFO Identifying: Learners are able to identify and solve problems in which responses show that responsible decisions using critical and creative thinking have been made when linking information sources to the purpose and form of the report, and when creating report templates, and when ensuring that the report meets the requirements of the full spectrum of recipients

Unit Standard CCFO Working: Learners are able to work effectively with others in liaising with the report recipients.

Unit Standard CCFO Organising: Learners are able to organise themselves and their own activities to ensure that the reports are distributed on schedule.

Unit Standard CCFO Collecting: Learners are able to collect, organise and critically evaluate information when gathering the information required in the report and organising and collating it into the report as required by the relevant parties

Unit Standard CCFO Communicating: Learners are able to communicate effectively using visual, mathematics and language skills in the modes of oral and/or written presentations

Unit Standard CCFO Science: The learner is able to use science and technology effectively and critically when creating templates, compiling the report and using the required distribution system to deliver the report

Unit Standard CCFO Demonstrating: Learners are able to demonstrate an understanding of the world as a set of related systems by considering the needs of all relevant parties

SECTION 1: PURPOSE AND CONTENT OF REPORTS

Outcome

Relate the purpose, content, form, frequency and recipients of a range of reports to the information needs of a selected business

Assessment criteria

- ✓ Identify the regular reports for a selected organisation
- ✓ Link the information needs of the organisation to the purpose of each identified report
- ✓ Draw up a template for each report in the company specific format including the mandatory content headings
- ✓ Create a table listing each report, its purpose, the regular recipients and frequency of distribution

Reports are essential to every business, as this is one of the main ways in which information is distributed throughout the organisation. This section therefore includes an introduction to business correspondence. Following this introduction and layout of a report is explained. Guidelines for preparing reports and financial data are also included. Procedures to collect information and organise the material is explained and hints on how to write effectively are included. You will also find an example of a funding or project proposal at the end of the section.

Introduction to Business Correspondence

There are many forms of business correspondence; however the types most used will be discussed shortly.

Business Letters

Business letters can be formal and informal and are sent to parties outside the business. Internal correspondence is usually done on a memorandum.

There are many kinds of business letters such as:

- ✓ Enquiries and replies
- ✓ Orders and follow-up letters
- ✓ Claims and adjustment letters
- ✓ Employment letters
- ✓ Letters giving information about products and services
- ✓ Letters to the press

The layout of the letters will all be more or less the same but the style and register will vary depending on the industry and the corporate culture. Banks, Insurance companies and legal firms tend to compose business letters using the formal register, while other companies and industries tend to use a less formal style that is a mix between the formal and informal register.

The Parts Of A Business Letter

Letterhead

Most businesses these days use letterheads that already have the name, address, telephone and fax numbers as well as the e-mail address printed on the letterhead. If not, it can be typed or written at the top left, middle or right hand side of the page.

Date line

Directly underneath the address the date is inserted in what is called the date line. It is better to write the date fully in any of the following formats, depending on the custom in the organisation:

Year, month, day

Day, month, year

Month, day, year

Reference line

It is customary to quote reference numbers and/or initials next, but this may also be stated at the end of the letter.

Our ref XYZ/CK

Your ref BDX/LM

Attention line

If you are writing the letter for someone's attention, you will quote that person's name in the next line, which is called the attention line:

Attention Mr/Me …

Inside address

The inside address is quoted on the left hand side and this is of course the address of the receiver of the letter.

Salutation line

Greets the reader and sets the mood or tone of the letter:

Dear Sir/Madam

OR

Dear Mr Brown

These days you can also address the person as follows:

Sir/Madam

OR

Mr Brown

Subject line

The next part of a business letter is called the subject line where you give the reader an indication of what the letter is about and it is usually typed in capital letters or capital and lower case letters that are underlined:

QUOTE FOR EXAMINATION BOOKS

OR

Payments received

The body of the letter

This part contains the entire communication of the letter.

The closing

The tone of the closing should be the same as the tone of the message and the salutation. Sometimes it will be very formal, depending on who you are writing to and what the tone of the letter is:

Yours faithfully

OR

Sincerely yours

It can also be informal, depending on the style and type of letter:

Best regards

Signature

Spaces are left open for the person who has to sign the letter. Then the person's name is typed in and the status or position of the person in the organisation:

P Brown

MANAGING DIRECTOR

Enclosures

If you are sending enclosures, you will quote them underneath the signature

Enclosures (4)

Formative assessment 1: individual exercise

Plan a business letter

A successful business letter is based on clear thinking, a clear and definite purpose and adequate planning.

- ✓ You have to read and reread all the correspondence that relate to the letter you want to write so that you can be sure your reply is complete.
- ✓ Note the main ideas of the correspondence that relate to the letter you want to write
- ✓ Collect background information to make sure that you are well-informed.
- ✓ Sort your ideas and keep only information and ideas that are valid and have bearing on the letter you want to write.

The first sentence of the body of the letter is the introductory sentence and will state (announce) or acknowledge something. If you plan your introductory sentence carefully, it will attract the attention and interest of the reader.

If you want someone to react favourably to your letter you have to convince them that it is to their advantage to do as you suggest. To do this, you will adopt the *'you-attitude or approach'.*:

- ✓ I am pleased to tell you…
- ✓ In your letter of ….. you asked …
- ✓ I have good news …
- ✓ Thank you for your interest in …

The message of the letter: this will be the middle section of the letter.

Plan your paragraphs carefully and apply the principles of writing good paragraphs that you learnt in earlier modules. Use positive words in your body and avoid negative words.

In the following table you will find examples of negative words that you must avoid.

Inferior	Stupid
Unacceptable	Neglect
Blame	Cancel
No	Incompetent
Refuse	Failure
Defective	fault
ignorant	biased

For example, when a client complains about something do not say:

"We have received your letter in which you allege that the spare parts have been damaged.."

Rather say:

"Thank you very much for telling us about the problem you have with the spare parts..."

Select words that are simple, clear and direct. Avoid fancy, smart and bombastic words that most people don't understand. Remember not to use legalese, jargon, slang, etc unless you are sure your reader will understand or unless you *have to* use technical or legal language.

As soon as you have achieved the purpose of writing the letter, stop writing. The concluding paragraph in a business letter should convince the reader that he/she is a customer or client of value, it should promote goodwill and contribute to good public relations:

- ✓ Please tell us if you need more information
- ✓ We look forward to receiving your instructions.

Memorandum

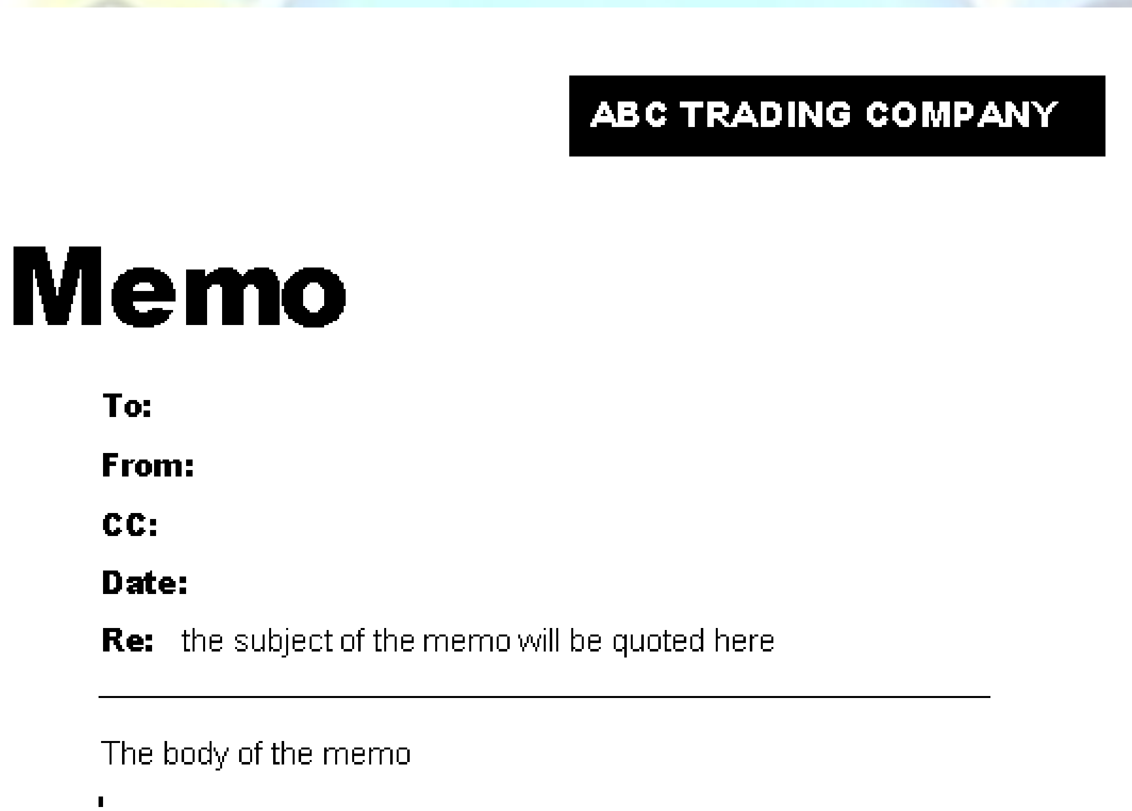
A memorandum is an informal, written piece of information which is intended to remain within an organisation. These days the abbreviation memo is used for the short inter-office memorandum.

A memo would also usually be printed on a letterhead and will have a definite layout as required by the organisation.

Below is an example of a memo. The same rules when composing a business letter will apply when you write a memo to someone else in the organisation:

- ✓ Plan what you want to say
- ✓ Collect background information
- ✓ Sort your ideas and facts
- ✓ Take care how you construct your paragraphs and sentences

Memos are not usually signed, unless required by the organisation.


ABC TRADING COMPANY

Memo

To:

From:

CC:

Date:

Re: the subject of the memo will be quoted here

The body of the memo

Facsimile

A fax is a method of sending business correspondence via a fax. Most organisations today have a standardised form for use when sending a fax. Faxes should usually be signed, since it is a document that represents the organisation and the person sending it. however, check what the custom in the organisation is before you sign a fax.

NAME OF COMPANY

FACSIMILE TRANSMITTAL SHEET

TO: Recipient of fax	FROM: Name of person sending the fax
COMPANY: Company or organisation the recipient works for	DATE: 5/18/2009
FAX NUMBER: Their fax number	TOTAL NO. OF PAGES INCLUDING COVER: Number of pages sent so that the recipient can control that all the pages were received
PHONE NUMBER: Their phone number	SENDER'S REFERENCE NUMBER: The reference number of the person sending the fax
RE: Subject of fax	YOUR REFERENCE NUMBER: The recipient's reference number

☐ URGENT ☐ FOR REVIEW ☐ PLEASE COMMENT ☐ PLEASE REPLY ☐ PLEASE RECYCLE

Body of the message

Reports

Definition

A report, in whatever form, can be defined as follows:

> ***A report is a written, systematic account of the actions, observations and findings of the reporter on which he has based his deduction and opinions.***

Purpose

The purpose of a report is:

- to convey information to another, and/or
- to create a permanent record of the occurrence.

Report is a comprehensive term for *written information based on facts* and can cover many topics. A report is an objective, well-structured, written document based on accurate facts with the purpose of conveying specific, useful information to its readers. A report is unique: no two reports are the same.

In the business world, a report will usually be as a result of something that was investigated or researched, such as the implementing of a new computer system. The custom in the organisation will determine whether the report is written in the formal or informal register.

Reports usually consist of the following: (see handout)

- ✓ A cover page
- ✓ A title page
- ✓ Introduction and statement of the aim of the report, also called the terms of reference
- ✓ A brief summary of the main contents
- ✓ A table of contents
- ✓ Procedure followed during the research or investigation
- ✓ Findings and conclusions as a result of the research or investigation
- ✓ Recommendations based on the research or investigation
- ✓ bibliography

The layout of a report

Introductory statement (terms of reference)

State the aim of the report, who requested it and why it was done

Summary of report

Summarise the main contents of the report.

1. Procedure
2. Findings.
3. Recommendations.

Table Of Contents

Introduction

This is your introductory paragraph, where you introduce the report to the reader

Procedure

Here you will state the procedure(s) you followed to gather information, such as: contacted the follwing computer wholesalers:

- ✓ Abc trading
- ✓ Xyz computers
- ✓ Technical computer experts

Findings

Here you will state your findings: how much each quoted for the same kind of PC, what after sales service each company offers, what training they can provide or receommend, etc.

Conclusion

- ✓ This will usually be a summary of your findings:
- ✓ The kind of PC's available
- ✓ The prices
- ✓ The training provided
- ✓ After sales service, etc

Recommendations

Your recommendations as to the kind of PC's that the organisation should purchase, the prices, that should be paid, the training that should be provided to the staff.

The purpose of a recommendation is to convince the reader to take a decision which the reporter deems the most suitable under the prevailing circumstances.

In almost every report it is necessary for the reporter to make a recommendation, even if it was not requested for by the authority ordering the report to be submitted.

It is useless to submit an unmotivated recommendation. Such a recommendation is meaningless and carries no weight. Should the writer recommend a specific action without indicating why he has considered it as the most suitable solution, he has missed his goal.

Appendices

You will probably attach quotes and profiles of the companies for the reader to view.

Annexures and *appendixes* which are attached to reports, must be numbered. Annexures are numbered with capital letters of the alphabet and appendixes with Arabic numerals, ie Annexure "A", "B" and Appendix 1 and 2. The difference between an annexure and an appendix is that an annexure is a document without which the report would be incomplete.. An appendix is an explanatory document with which the original writing would, in any case, be complete, viz a map of the surroundings.

Bibliography

If you made use of books, magazine articles, etc in your research, quote you bibliography here.

The contents of a report must be concise and written in the first person.

You have to develop a writing style that is direct and straightforward. Although exceptions may sometimes be necessary, only one subject is to be dealt with in a particular report.

Reports can sometimes be lengthy. In such instances it is necessary to make use of *headings* and *sub-headings*. It is also necessary to give a brief *summary* of the contents at the beginning of the report, to clearly outline the nature of the contents to the reader. These particulars should, preferably, be given in the first paragraph.

This learner guide has examples of headings and sub-headings.

The contents of the report must be *complete, comprehensive and brief*, without discourteousness. High-flowing terms, sarcasm, etc should be avoided at all times without being excessively humble, servile or insipid.

Write in a concise, simple, direct style and in the first person

When writing a report, ensure that you keep the language you use simple, clear, understandable and to the point.

Also, when writing a report you should do so in the first person. This means you reffer to yourself and what you experienced in the report.

Preparing Reports And Financial Data

A report is a written document or oral presentation in which a problem is discussed and examined. Information is conveyed, findings and conclusions are analysed and reported and sometimes recommendations are made for future action.

Some reports require that financial data must be incorporated. This could take the form of schedules, tables, financial data within managerial reports or financial reports.

Reports must never be long-winded or difficult to understand. A report must always be clear and to the point. A report must state at the beginning what it contains and how it is to be used. This is done in the introduction, also called the terms of reference.

Preparation

When you compile a report, your preparation must be careful and thorough, especially when you are working with financial data. The smallest error could cost the company a great deal of money and you could lose your job.

Check everything you have done very carefully. You can even ask someone to check the information with you to make sure that the report contains no errors.

Before you start, think carefully about:

- ✓ The subject and purpose of the report
- ✓ The information the reader already has

- ✓ What the reader needs to know
- ✓ The use to be made of the report

Collect information

Gather all the information you need, by

- ✓ Reading: for example technical journals, newspapers, sales literature, previous financial reports, etc.
- ✓ Looking: observe what the present methods are, what problems exist
- ✓ Talk to people about the problem you want to solve, which may also affect them
- ✓ Carry out a survey or devise a questionnaire

Write your information in note form, on separate pieces of paper, so that it will be easy to organise into the correct order when you are ready to do so

Organisation

When you have collected all the information:

- Check it carefully for accuracy
- Decide on your main sections and their order
- Work out appropriate headings and their order, then work out the most logical sequence for the information in each section
- Arrange your facts in each section
- Note down any recommendations you wish to make
- Think about summarising complicated or long pieces of information. You could even put information into appendices
- Prepare any diagrams or illustrations which will help the reader to understand the report or speed the reading

Draft the report

1. Choose a style and language which would be suitable for presenting the information and findings to the reader. The style should:
2. Be objective and accurate, based on facts and not personal views. if you express personal views, state clearly that these are your personal views
3. Clearly distinguish between facts and conclusions which can be drawn from facts
4. Be impersonal, unless you were requested to state personal points of view
5. Consider the reader all the time and maintain a suitable formality according to the relationship between you and the reader

Figures

Figures should be done in a table

Language	Male	Female	Total
Afrikaans	2,900,214	3,083,212	5,983,426
English	1,772,483	1,900,720	3,673,203
IsiNdebele	342,366	369,455	711,821
IsiXhosa	3,726,376	4,180,777	7,907,153
IsiZulu	5,045,450	5,631,855	10,677,305
Sepedi	1,987,170	2,221,810	4,208,980
Sesotho	1,704,071	1,851,115	3,555,186
Setswana	1,774,785	1,902,231	3,677,016
SiSwati	571,429	623,002	1,194,431
Tshivenda	482,134	539,623	1,021,757
Xitsonga	1,001,446	990,761	1,992,207
Other	126,117	91,175	217,292
Total	21,434,041	23,385,736	44,819,777

Layout

Reports are usually long and lengthy documents. Remember to make use of the following:

- ✓ headings
- ✓ titles
- ✓ subtitles
- ✓ paragraphs
- ✓ numbers and bullets in your document
- ✓ visual aids

Types Of Reports

A report can also be defined as the presentation and interpretation of gathered information.

In any organisation there is a need for information that has been gathered and compiled to be presented in such a way that everyone in the organisation can obtain the information they need without reading through piles and piles of information. This is why a report is such an important feature in any organisation.

The types of reports vary:

- ✓ *Financial reports* such as budgets, cash flow statements, income and expenditure reports and balance sheets
- ✓ *Progress* reports about projects, work in progress, team and group work
- ✓ Reports that show *production* figures
- ✓ Reports that *compare* items, for example a comparison of various types of computer equipment that the organisation wants to purchase
- ✓ Reports about *absenteeism*, annual leave, strikes and stay aways
- ✓ Reports about *inventory* (stock) levels

These are just a couple of the reports that can be required in an organisation.

The *timing* of reports is also of importance. Reports can be required:

- ✓ Daily
- ✓ Weekly
- ✓ Monthly
- ✓ Quarterly
- ✓ annually

Who needs reports and why?

Financial reports

Financial reports are required by the financial department as well as the various departmental managers in the organisation. They need to check the budget of the organisation as well as the individual departments in order to find out if the organisation is spending too much money or too little money.

Similarly, the income and expenditure statement must be checked regularly to make sure that the organisation is not spending more money than it is earning.

Balance sheets are usually compiled annually and forms part of the annual report of the organisation. The balance sheet and annual report contains information that is important to stakeholders of the organisation, such as shareholders, clients, creditors and even the employees of the organisation.

The timing of the reports will vary: top management will probably only look at financial statement on a monthly, quarterly or six-monthly basis, while department and section managers will look at their financial statements on a weekly or even daily basis.

Progress Reports

No project can be managed successfully without regular progress reports which will show if the activities that have to take place in order for the project to be completed on time are taking place when they should be taking place. The progress report will also highlight any problems in time so that corrective action can be taken to ensure that the project finishes on time.

It is not only big projects that require progress reports, smaller tasks such as annual leave lists, productivity figures and so on also require progress reports.

These reports are used by section and departmental managers and, of course, project managers, to track the progress of a task or a list of tasks. Any problems that may occur can be identified early and important decisions, such as the purchasing of office equipment, can be made in time.

Production Reports

In any manufacturing company, production is very important. The section manager will look at the production figures on a daily basis and compare it to the tactical plan that contains the daily production figures required by the business.

If the targets are not met, he can find out what the problem is and set it right as soon as possible. The departmental manager will probably look at the production figures on a weekly or monthly basis and the top management of the company will require monthly or quarterly production reports.

What Are Reports Used For?

Information

Top management will usually look at reports showing production figures or sales figures for information only. They will use this information to find out if the organisation is meeting its goals and objectives. They will also use this information to set the long- and medium term goals and objectives of the organisation.

Making Decisions

Middle and junior management will also look at sales, inventory or production reports for information, but they will also use the information to make decisions. If the production or sales figures are too low, middle and junior management have to investigate to find out where the problem is. Then a decision has to be make about how to solve the problem.

Developing Action Plans

Once a decision has been made, an action plan can be developed to either:

- ✓ Solve the problem
- ✓ Purchase the equipment
- ✓ Introduce the new product

- ✓ Change the policies and procedures of the company, depending on the purpose of the report.

Accurate information

Whatever the report is used for, the information it contains must be accurate and must reflect the true state of affairs of the events it is recording.

Nobody can make an informed decision if all the information is not available and if the information is not accurate or is outdated.

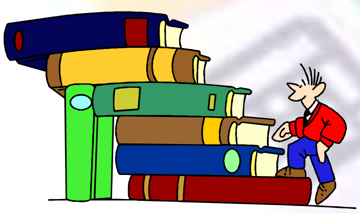
This might seem silly to you, but even for making a decision about something as simple as your transport to work or class you need accurate information in time. if you use a bus or taxi as transport and the workers go on strike, you have to be informed in time because you have to make alternative arrangements to ensure that you get to work or class on time.

The information needs of an organisation will vary, depending on the type of organisation. The format the reports have to be in will also vary, depending on the requirements of the organisation.

As a secretary or admin clerk, you will have to find out:

- ✓ What *types* of reports are required by your organisation
- ✓ What *information* is needed to compile these reports
- ✓ *Who* will you get the information from
- ✓ In what *format* must the report be done
- ✓ How *often* it must be sent out
- ✓ *Who* the various reports must be sent to

Collect information



Before you start writing your document, you have to plan what you are going to write. First, you are going to define the topic and then you have to gather information about the topic.

When doing research about a topic it is important that you gather as much information about a subject as possible. The more information you have, the better. Of course, the information and data must be relevant to the topic that you are going to write about.

Organise the material

Once you have gathered information, the material you have collected has to be organised.

Sorting and categorizing

Arrange or organise the information with common features or characteristics systematically in groups. All the information with similar content is grouped together. Your classification will depend on the order in which you are going to write the document: you can sort the information chronologically, using contrast or cause and effect.

Sifting for relevance

Once you have classified the information and data, you have to sift through it for relevance. You should keep only the information that is relevant to your topic, everything else can be discarded. In other words, if you are writing about plants that flower in summer, all information about plants that flower in autumn is not relevant, you cannot use it to enhance your writing and you should discard it.

Validity and reliability

Now you have to check your information for validity and reliability. The obvious way of doing this is to check your facts with more than one source: check more than one manual, talk to more than one person, visit more than one website, to ensure that your facts are correct. Preferably, you should use more than one manual, more than one website and the knowledge of more than one expert for each aspect that has to be checked. If most or all you sources state the same basic fact, you can be reasonably sure that the fact is correct.

Recording

Once you have sifted and verified your information, record it in the categories you have selected. This recording is in draft form, usually in the form of rough notes.

Now you are ready to draft your first copy of the final document.

Write Effectively

Plan what you are going to write

- ✓ *Who* will you be writing for: your friends and family, the general public, a business document, a newspaper or magazine article, etc.
- ✓ In which *register* will you be writing the text: formal or informal
- ✓ Which *writing style* will you use: narrative, discursive, expository, etc.
- ✓ Will you write in the *first person* or the *third person*?
- ✓ Determine the *research* you will do
- ✓ *Organise* your writing: make sure ideas and facts flow logically

Make your writing interesting

- ✓ Use punctuation correctly
- ✓ Use titles, subtitles, headings, contents and index
- ✓ Use an introduction and a conclusion
- ✓ Use visual images and captions with these images
- ✓ Vary the length of your sentences
- ✓ Structure your paragraphs correctly
- ✓ If any action is required, make suggestions about the actions
- ✓ Put ideas forward
- ✓ Use appendices or addenda if required

Diction

- ✓ Choose words that are familiar and easy to understand
- ✓ Make sure that you are using the correct words
- ✓ Do not use technical language, legalisms, etc. when writing for the general public. When it is a business document, use of technical terms and jargon will be acceptable
- ✓ Do not use slang or write in dialect unless you are writing to entertain

Always

- ✓ *Be ethical*: readers must be able to trust your writing
- ✓ *Quote facts* and substantiate your facts with evidence so that the readers can believe you
- ✓ Be *sensitive* to the reader's point of view, culture, etc.

Bibliography

A bibliography is a record of the resources and sources you used during your research. Follow the following format when quoting the sources of your information:

- ✓ Author surname and initials
- ✓ The year it was published
- ✓ The title of the book
- ✓ Where it was published
- ✓ The name of the publisher

When you quote the author directly, you have to add the following to your text where you use the quote: (Sayles & Chandler, 1971:185)

- ✓ Sayles & Chandler are the authors
- ✓ 1971 is the year the book was published
- ✓ 185 is the page number where the quote appears

Then, of course, you have to add the details of book to the bibliography.

Checklist

When you are gathering information, organising your material and considering your audience, it is a good idea to start with a checklist. This will help to keep you focused so that you always bear in mind your purpose for writing, your audience and how to organise your writing.

For example, if you want to write a report about the perception of HIV/AIDS among the students of the college, you could draw up a checklist for yourself, asking the following questions:

Who is my audience?	
What style should I write in?	
What topics would I choose: perceptions regarding testing for HIV/AIDS, prevention of HIV/AIDS, rights of people with HIV/AIDS, support for people with HIV/AIDS, etc	
What visual aids will I use?	
Where will I gather information?	
How will I organise information? Will I start with the impact of HIV/AIDS on the family or the community or the workplace?	
And so on.	

You will use this checklist when you start writing the report to make sure that you keep to the subject and the interest of the audience.

Select The Format And Structure Of Your Text

When you are writing a document for business, you always have to select the appropriate format. If a client writes to you to find out about a specific range of products or services, giving them a report of 20 pages about the advantages of wearing a specific shoe, will not help the client to decide which style or colour of shoe he wants. You would rather send the client a brochure giving details of a range of shoes, with the available colours, sizes and uses. Only if the client wants more details about a specific type of shoe will you think of sending a report.

The structure of the text should also suit the specific document you are writing. We do not usually include visual aids, slogans and sales hype in business letters –these are included in brochures and advertisements of the products.

Each kind of business document has its own purpose and depends on what the client is asking you and what the purpose of the communication is.

So, when you are writing a business document and you have to send it outside the company, before you start writing, consider:

- ✓ The purpose of the writing
- ✓ The needs of the client (the person who needs the report)
- ✓ The type of business document you will use
- ✓ The register: formal or informal
- ✓ The style of writing
- ✓ What information to include and what to leave out

Identify Main Points

Once again, consider:

- ✓ The purpose of the writing
- ✓ The needs of the audience,

so that you can identify the main points of your writing. Once you have identified the main points, you can add the supporting details. Remember to structure your sentences, paragraphs and document in a logical manner.

First Draft

To express yourself clearly in writing you should pay special attention to:

- ✓ Reading and understanding, also called comprehension.
- ✓ Assembling fact and constructing prose (text).
- ✓ Sentence structure.
- ✓ Paragraphing.
- ✓ Assembling paragraphs.
- ✓ Making a summary.
- ✓ Taking notes.
- ✓ Expanding notes.

Then you can use organizational features of text to assist you in making the document more understandable and pleasant to look at.

Titles, Chapters, Contents

The title of textbooks and manuals, such as you used in school will contain information about the subject of the textbook.

Textbooks are then divided into chapters. Each chapter will contain information about a specific subject that relates to the title or main subject of the text book.

The chapters can then be further subdivided into sections and, if the manual is comprehensive, even sub-sections.

Contents Page

The writers who compile text books always try to make it easy for us to find specific information about a certain subject. Every textbook will have a contents page, which will give the main headings of the different chapters of the textbook.

You can then go to that page and look at the contents from that page on. Now you can page through the chapter, looking only at the *headings* of sections until you find the information you are looking for.

All this makes it easy for you to find the information in the first place and also to refer back to the information afterwards.

Introductions

Most textbooks, chapters in textbooks and sometimes even sections in chapters will start with an introduction. The purpose of the introduction is exactly what the name implies: to introduce the subject to the reader. An example of an introduction is included in one of the pages for you.

Foreword

A foreword is found at the beginning of most books and is an introduction by the author of the book. It is different from the Introduction in that it is an explanation by the author of why the book was written.

Appendices Or Addenda

Are added at the end of a book and they usually contain extra information or exercises that pertain to certain chapters and sections in the book.

Conclusions And Summaries

Authors will many times include summaries at the end of sections or chapters. A summary is a brief overview of the main points of the content that was discussed during the section or chapter. At times the author will end the section or chapter with a conclusion in the place of a summary. The conclusion will be based on information discussed during the section or chapter.

The summary or conclusion should also give you a brief overview of the main points discussed in the section or paragraph.

Paragraphs, Layout, Font

In chapters and sections the written (or typed) contents will also be broken down into paragraphs. As seen in module 1, each paragraph should have its own subject, with the sentence of the previous paragraph leading into the subject of the second paragraph. The first sentence of the new paragraph should then introduce the new paragraph.

The layout of the page would usually also enable you to skim through the page if you quickly want to find out what the contents of the page are about. Many textbooks and other books will also be laid out in a way to make it easy for you to skim through the contents. At times the author will also highlight important words by using **bold**, *italics* or <u>underline</u>. Look out for these visual clues when reading through a text book.

All the above are techniques that enable you to find out quickly what the book, chapter or section is about. Once you have satisfied yourself that the contents are relevant to what you want to do, you can start reading the contents in depth. This will make it easier for you to understand what the subject of the content is and will save you the time of rereading the entire contents many times.

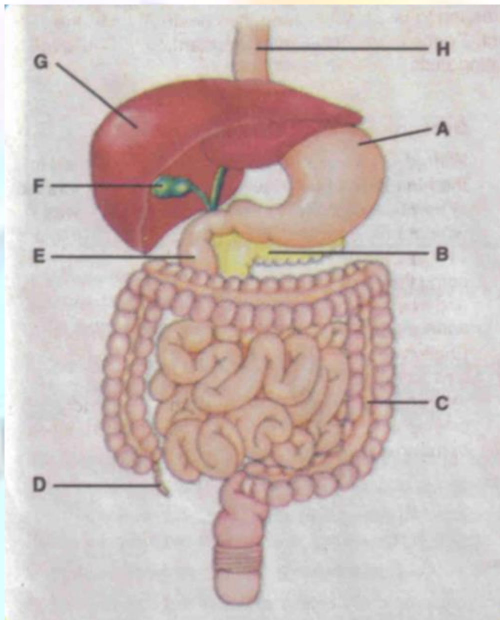
Visual Clues

Authors also use visual clues in order to emphasize, illustrate or explain certain points.

Diagrams

A simplified drawing showing the appearance or structure of something.

This is a diagram of a human's insides

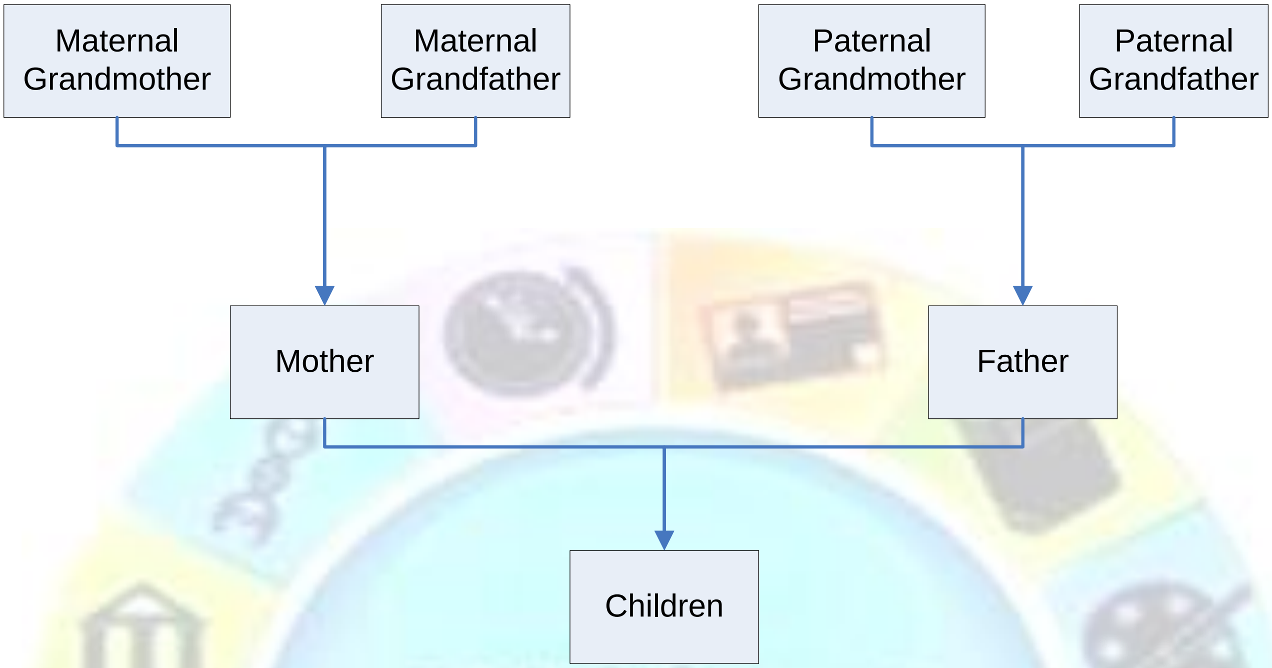


Tree Diagram

A tree diagram is a tree-shaped drawing showing a structure of something. The best examples are to be found in family trees, where you list you grandparents from your mother's side and your father's side, then your parents and then yourself, your brothers and sisters. Of course, the diagram can be bigger than this – you could start with your great-grandparents or even further back, and you can also include aunts, uncles, nephews and nieces.

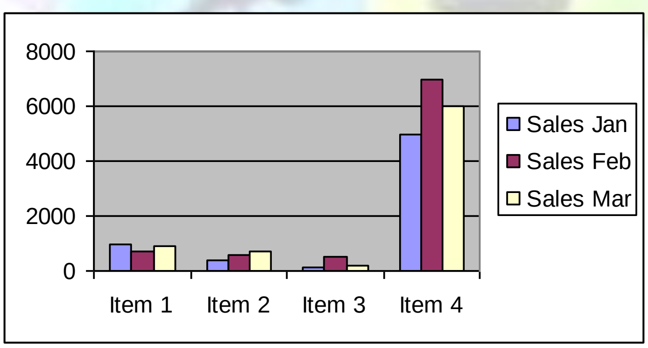
It is called a tree diagram, because it starts big at the top and then becomes smaller with the next lines.

Below is an example of a family tree starting with your grandparents



Graphs and charts

	Sales		
	Jan	Feb	Mar
Item 1	1000	700	900
Item 2	400	600	700
Item 3	100	500	200
Item 4	5000	7000	6000
Totals	6500	8800	7800



Tables

> ***A table is a list where figures, facts or other information is given shortly.***

Captions

A caption is a title or brief explanation that is printed with a visual aid, which can be a photo, an illustration, a diagram or a cartoon.

Nelson Mandela becomes President of South Africa

10 May

President Nelson Mandela was inaugurated today as the first black leader of South Africa after his African National Congress (ANC) party swept to victory in April in the first "free and fair" election held in South Africa. Whites, blacks and "coloureds" joined in joyful celebration. In his speech, he gave generous praise to F.W. de Klerk, the last white President, who abandoned apartheid and released Mandela and other political prisoners so that the "rainbow nation" could take its place among free and democratic states.

▲ *Mandela casts his vote in April.*

▲ *President Mandela joins hands with ex-President de Klerk.*

The captions to the photos state:

Mandela casts his vote in April and President Mandela joins hands with ex-President de Klerk.

Can you see that you only have to look at the photos and the captions to find out what the article is about? If you want more information, you would have to read the article, but you already have an idea what the article is about.

Photographs And Other Graphics

Authors use a wide range of visual images to enhance their text and to persuade the audience of their point of view. Photos and other visual images such as graphs, cartoons, drawings, paintings, etc. are also used to give the reader visual clues about the written piece.

Rewrite the first draft

Once you have written the first draft, read through it at least two or three times.

Make notes about the errors and changes you want to make as you go along:

- ✓ Make sure that your use of grammar is correct and right for the audience.
- ✓ Is your language clear enough?
- ✓ Play around with the layout of your document: change the style of the headings, titles and font, move the visual aids around – do they look better this way or that way?
- ✓ Check your use of technical language, legalese and jargon – will the audience understand your message?
- ✓ Is your information presented in a logical way?
- ✓ Are your facts correct? Are you sure?

Now rewrite the first draft, making the changes that you indicated.

Formative assessment 2: group exercise (SO1 AC1-4)

EXAMPLE OF A FUNDING OR PROJECT PROPOSAL

COVER PAGE

Department of Public Works (Mpumalanga Province)

Application to European Union by the Department of Public Works (Mpumalanga Province)to fund Project Management training for Senior Managers

Date

1. INTRODUCTION

State the purpose of the report and the main intention for funding.

2. BACKGROUND

Give background information about the Department in relation to the request for funding

Provide background information about the project for which you require the money

3. PROJECT DESCRIPTION

Describe the project in terms of its scope, location, overall timeframes, target group, etc.

4. JUSTIFICATION FOR THE FUNDING / PROJECT

Explain why funding is so important

Explain who will benefit and how they will benefit – refer to all stakeholders

5. OBJECTIVES

Develop SMART objectives for the project or the issue that you wish to be funded

This is important because the funder will use these objectives to monitor the extent to which the money was spent effectively.

The funders' brief should be incorporated into the objectives.

6. ACTION PLAN OR WORK PLAN

Include an action plan or work plan that details how you intend to implement the objectives.

Your action plan should cover the following categories: activity, person responsible, deadline time, resources required, budget, indicators of success and assumptions (optional).

7. DURATION OF THE ASSISTANCE

Indicate the time frame for the funding – depending on the funders' specifications, funding is usually given over a period of three years.

8. PROJECT SUSTAINABILITY

Funders want to know that they will not be giving you money forever. It is therefore important to explain how you intend to be sustainable after the time frame has expired.

9. MONITORING AND EVALUATION

Funders will tend to fund projects if they know that there is a secure monitoring and evaluation process in place.

Monitoring is an on-going process, whereby usually a team of skilled people are selected / elected to monitor the way in which the objectives are met. Corrective action is usually taken based on the verbal and written recommendations of the monitoring team. Funders are satisfied if they receive regular (monthly) reports regarding progress.

Evaluation occurs after the project has been implemented. Usually an independent and impartial person evaluates the project against the objectives and the brief provided by the funder.

10.COST IMPLICATIONS

State the amount that you are requesting.

Include a budget. If funding is requested for three years, your budget should reflect this.

11.CONCLUSION

It is proposed that the EU provides the Department of Public Works (Mpumalanga Province) with R100 000 for the training of Senior Managers in Project Management Skills. The Department will provide the EU with Progress Reports once a month and an Evaluation Report upon completion of the project. Ms R Sithole will be the contact person from the Department of Public Works (Mpumalanga Province).

_____________*(Print name)*___________*(Signature)* _______ *(Date)*

SECTION 2: ORGANISATIONAL PROCEDURES RE DISTRIBUTION

Outcome

Identify information sources and organisational procedures for obtaining and distributing information relevant to a selected business function

Assessment criteria

- ✓ Create a table listing each report and the information sources required for input to the report. The information sources are linked to specific headings within the report
- ✓ Draw up a table listing each information source, from whom it is obtainable, when it is available, its level of confidentiality, and to whom it should be returned
- ✓ Identify company procedures for obtaining information sources for each information source and linked to the table above

During this section factors that affect the quality of information, the value of information to the organisation and information sources within the organisation will be discussed.

Information

We all know that we live in the information age. In fact, we have access to so much information that we at times suffer from information overload. The management team of an organisation needs information in order to make informed decisions about the organisation. This information is usually in the form of a report. They will then study various reports to make decisions about the future of the company, for example whether to expand and employ more people or whether the company should downsize and retrench employees.

Management will also make decisions about advertisings and promotions, salary increases, product lines and the positioning of the organisation in the market.

For management to make informed decisions, they need up-to-date and accurate information.

Factors That Affect The Quality Of Information

For information to have value to the organisation, it should have the following characteristics:

Information should be up to date

After Saturday training, each store in a chain submits weekly sales returns to the central computer. The analysis of these returns is available for the directors' scrutiny each Sunday. When the weekly board meeting is held on Monday, the directors have information that is thirty-six hours old. They can act on any apparent trends immediately, giving the company an advantage over competitors who gather their information more slowly.

The importance of timely information cannot be stressed enough.

Information should be accurate

- A sales clerk needs to know that the amount recorded on the till roll is the same as cash, cheques and credit vouchers in the till.
- The store manager needs to know whether trade is up or down and by how much in each department. The nearest R10 rather than the nearest cent might be sufficiently accurate information for the decision the manager needs to take.
- The directors may be content to work with figures that are accurate to the nearest R1000.
- The shareholders may be satisfied with information that is accurate to the nearest Rl0 000.

In each case, the information is sufficiently accurate for the needs of those people who wish to use it. Senior managers usually do not require to know how much was taken in the food hall on Monday 18 March, although the department manager would want to know this. To devote more or less space to food, senior managers would want to know whether food sales were increasing or decreasing.

Inaccurate information could lead to bad decision-making, loss of profit, etc.

Information should be complete and relevant

Rain in the Eastern Cape has meant that sales of umbrellas rose by 50% last week. If they had made no returns from Durban store in respect of umbrella sales, it would not be sound management to assume that it was similarly wet in Durban, that the sales were up 50%, and to increase the order to the supplier of umbrellas accordingly.

Nobody can make an informed decision if they do not have complete and relevant information.

How intelligible is the information?

When information is presented, it needs to be well laid out and to the point. It should also not be too complex. It is better to simplify information.

Can the information be verified?

Users of information should be able to check the information to ensure that it is correct. In fact, checks about the accuracy of information should be carried out from where data is input through the process to where information is the output.

Is the information accessible?

The people who need the information must be able to access the information easily.

Is the information secure?

At the same time, the organisation wants to ensure that only authorised personnel have access to the information.

The Value Of Information

Information that has all or most of the above characteristics will have value to the organisation. Information will help managers and other decision-makers to achieve the goals of the organisation. It follows, therefore, that the value of information is directly linked to how it helps the organisation and the employees in the organisation to make decisions that will help the organisation achieve its goals.

Information sources

Reporting is done in all organisations:

- Financial managers have to report about the finances of the organisation, whether departments are adhering to budgets and whether the organisation is financially sound. Financial managers also report on projected income and spending for the organisation.
- Sales managers have to report about the sales that have taken place so far, projected sales, problems experienced with availability of products, pricing, problems experienced by customers, etc.
- Managers in charge of production have to report about progress made in producing the products, purchasing of raw materials, stock levels, projected production figures, etc.

- The administration department has to report about the state of administration in the organisation: is the capturing of data up-to-date, productivity, were errors made, what problems have been experienced, etc.
- The human resources department has to report on absenteeism, leave, the training plans, etc.

It follows then, that if you need financial information for your report you have to contact the finance department for the information you need, if you need to report on stock levels you have to contact stores or the production department and if you have to submit the annual Workplace Skills Program you have to obtain information from the human resources department.

Organisation procedures

Each organisation has policies and procedures in place for obtaining information and reporting:

- Who to obtain information from
- When reports should be done
- Who should receive the reports
- When each report is due

As you cannot just storm into the financial manager's office and demand the information you need, you have to follow company procedures. These could include making appointments, sending an e-mail or a memo, depending on the size of the organisation.

In large organisations, gathering and reporting information could become confusing and time consuming. To assist you, you will need a procedure to follow to make sure that you gather all the relevant information and compile and submit reports to the relevant people on time.

We suggest that you take the following steps to assist you:

- Create a table listing each report and the information sources required for input to the report. Then you link the information sources to specific headings within the report.
- Draw up a table listing each information source, from whom it is obtainable, when it is available, its level of confidentiality, and to whom it should be returned
- Identify the specific procedures in your organisation for the steps to follow for obtaining information sources for each information source. Once you have this information, link to the table above

Formative assessment 3: group exercise (SO2 AC3)

Formative assessment 4: individual exercise (SO2 AC1-2)

Formative assessment 5: individual exercise (SO2 AC1-2)

SECTION 3: COMPILE REPORTS

Outcome

Compile reports related to a selected business function, ensuring content and format are appropriate to information requirements and that reporting deadlines are met

Assessment criteria

- ✓ Compile the identified reports using current information.
- ✓ Use the created templates to write the reports and make and note any necessary modifications, to ensure compliance with business requirements
- ✓ Use the identified information sources to provide the information required by the organisation
- ✓ Distribute the report in the required manner in time to meet the specified deadline. (e-mail, postage, internal mail, courier, and delivery)

There are certain requirements for good reporting that apply to all reports in all organisation and these requirements will be explained, as well as how to write a report and pointers for all report writing will also be explained.

Requirements For Good Reporting

A report must meet certain requirements before it can be classified as a good report. It must be kept in mind that the writer and the reader are separated. The reader cannot question the writer in order to clarify obscurities. It is a waste of time requesting further information by letter. What is more, a poor report causes frustration, both to the reader and writer. The reader is ill informed and the writer has not achieved his aims.

The following are the general requirements for a good report:

Accuracy

To be accurate means to be *exact and precise*. In a report accuracy means that the report is an exact, precise and reliable rendering of the occurrence, condition or situation. All the knowledge the reporter possesses of the subject must be included, without, wittingly or unwittingly, omitting relevant or adding irrelevant particulars.

To ensure accuracy, one must distinguish between each of the following types of information:

- ✓ facts and hearsay;
- ✓ facts and deductions;
- ✓ facts and opinions; and
- ✓ the meaning of words.

Having distinguished between the mentioned types of information, does not mean that one or more must be omitted. On the contrary, the reporter must submit ALL the information. Should certain information on a report be hearsay, opinions or deductions, the reporter should clearly state this fact for the reader's information.

Facts

A fact is something which actually exists and cannot be changed.

For a reporter to state the facts concerning any occurrence, condition or situation he must have observed these facts himself by means of one of his five sense organs. The reporter may, however, possess other factual information which was not perceived by himself. Such information must also be included in the report, but in such a way that the reader will know that it is not a fact which has been observed by the reporter himself.

Hearsay

For the purpose of reporting, hearsay is *all other information*, being fact or fiction, which the reporter did not observe himself. Such information must not be withheld. The reader must, however, know that it is hearsay and that the reporter cannot vouch for the truth or correctness thereof.

Deductions

A deduction is the *conclusion drawn by a person by means of his reasoning*. It must be grounded on facts and must be logical. Different persons often make different deductions from the same facts. Enough facts must be submitted to enable the reader to make his own deductions. This must be included in the report and be indicated as such, so that the reader does not confuse the deductions with the facts.

Opinions

An opinion is *a point of view* or conviction which a person forms regarding something. To carry any weight, an opinion should be based on facts, although this is not essential. The opinion of a reporter is of value to the reader provided the reader is in possession of all the facts. He will then form his own opinion which will often coincide with that of the reporter. The reporter must, however, clearly indicate that it is his opinion in order not to mislead his reader.

The meaning of words

In the first place the reporter should know the *meaning of words* before he uses them. Secondly, it must be kept in mind that one word often has more than one meaning. The context in which a word is used will determine the significance of the word to the reader. By using a word in the right context the reporter can ensure that he conveys exactly what he intends to convey to the reader.

As an example, we take the case of a person that does not work. We can call him unemployed or a loafer. If he is unemployed, we do not think ill of him, since it is possible that he does not have work due to circumstances. If however, we call him a loafer, immediately there is an unpleasant connotation. To most people it indicates that this person does not WANT to work although he can find employment. The word "unemployed" causes sympathy whilst "loafer" causes antagonism. Whichever word is to be used will depend on what the reporter wants to convey to his reader.

The reporter must guard against using a word with an ambiguous meaning or making ambiguous statements.

Completeness

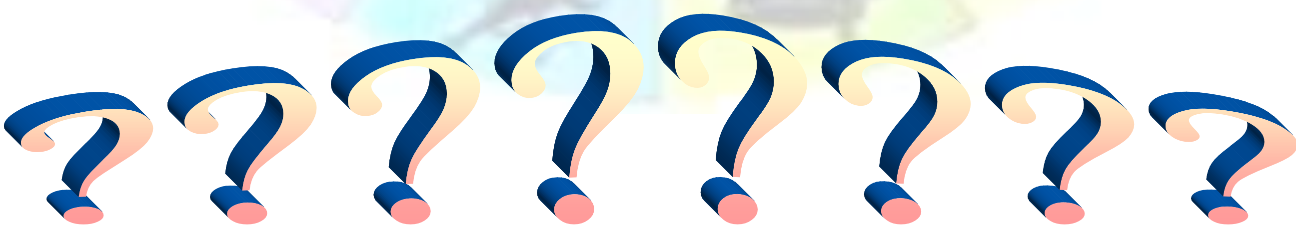
"Complete" means that *nothing is missing*. In reporting it means that the reporter has included in the report all the relevant knowledge he possesses of the incident.

> ***The best approach is to accept that the reader knows nothing about the subject.***

Never expect the reader to "read between the lines". Most readers interpret the written word literally. Guard against the danger of letting a reader read between the lines and so drawing his own conclusions.

To ensure, from the beginning, that the report is complete, the reporter should test every aspect or incident to be mentioned, with the following questions: (the example is based on reporting an incident, for example a mugging or armed robbery)

- ✓ *Who?* Has the person concerned been properly identified? Will the reader, or anybody else be able to trace the same person by using only the written information?
- ✓ *What?* Has the action, default incident and the relevant circumstances been clearly set out? Will the reader be able to establish exactly what has happened?
- ✓ *Where?* The place is always important in reporting. Where did the occurrence take place? Where is the accused or suspect? Where can the witness(es) be found? Where are the exhibits?
- ✓ *When?* The time of the occurrence is always important. What was the date and time? Was it day or night? When did the member resume duty? When will the witness be available?
- ✓ *Why?* One always probes for a reason. What was the motive for the deed? Why did it happen? Why was something done or not done? Care must be taken to avoid mere speculation. The facts of the incident are supreme importance, and the answers to all the "why's" will possibly be only opinions and deductions.
- ✓ *How?* The method or manner in which the incident took place must be set out. How was entry gained? How was the door opened? How was the escape accomplished?



The answer to all these questions fully constitute the essential knowledge on any possible subject.

Who What Where When Why How

Conciseness

The word "concise" means brief, yet comprehensible, and to the point. In a report "concise", therefore, means that everything that has to be said, is said in *as few words as possible* without omitting essential or relevant particulars.

Objectivity

To be objective means one must *not be influenced by one's own emotions or prejudices*. Personal feelings and prejudices of the reporter must not be reflected in the report.

The reader can easily be misled by the contents of a report if the reporter's reasoning was dominated by his emotions whilst writing the report.

Comprehensibility

If a report can be read and understood easily by reading it once only, and if the reader can find a specific portion in which he is particularly interested without difficulty, the report will be comprehensive. From the reporter this requires:

- ✓ good language usage,
- ✓ proper construction of sentences,
- ✓ breaking the report into paragraphs and sub-paragraphs, and the use of headings and sub-headings where lengthy reports are concerned.
- ✓ the use of correct punctuation marks plays an important part in avoiding ambiguity. A comma in a wrong place can change the entire context. A missing punctuation mark complicates comprehension. Avoid using long sentences as this makes the report difficult to understand, compels one to read the passage more than once and also causes punctuation errors.

Honesty

> ***To be honest in reporting means to convey the truth without distorting the facts.***

It has already been said that the reporter must submit ALL the information and knowledge concerning the subject matter to the reader. This also means that unfavourable information, either to the reader, the writer or anybody else, may not be withheld. Withholding such information could cause an incorrect decision being made.

The Finished Product

When preparing the document for a report or project or assignment, think about:

- ✓ The objective you set, or the intended purpose of the report- it must be short, yet clear, precise and it must create an interest.
- ✓ The specific audience and their understanding of the subject as well as the concerns they may have.

Purpose & Audience

Reports, projects and specific assignments and tasks in the workplace play an important role in the smooth flow of information.

- ✓ They provide accurate and unbiased (fair) information about a situation.
- ✓ When dealing with possible courses of action the findings in a report can highlight all the possibilities and consequences you should be aware of.

Keep the "C's" in mind for successful reporting;

Clarity:	the report must be transparent:- clear, and easily to interpret and understand.
Completeness,	it must all the relevant detailed information.
Conciseness,	It must be to the point and contain all the information clearly set out in a few words.
Correctness,	it must be free of errors, the information must be accurate.
Concreteness	It must be specific in its purpose, have a definite purpose.
Courtesy	be polite and respectful and reflect good manners.

Writing the report

The way in which you structure your report depends on the contents of the report and the intended audience. Some organizations have a specific format in which reports must be submitted.

Before you write the report you must

- ✓ First restructure and organize the information you want to use in your report.
- ✓ Develop the key components into meaningful paragraphs that are sequenced in a logical pattern.
- ✓ Organize these paragraphs under the correct headings without loosing the pattern making the report easy to read and to interpret.

Features of a formal report

The following features can serve as guidelines when preparing and writing a specific formal report..:

Feature	*Purpose*
Contents list	Gives an outline of the components addressed in the report. Number correctly and make sure the page numbers correspond with the titles. Include a contents list especially if the document is loner than 10 pages.
Executive summary	Every report should have an executive summary that gives a short summary of the contents of the report. At a glance a reader can see what it's all about, and decide whether the report is relevant to them or not. Don't make this summary longer than an A4 page.
Introduction	Contains the background or history to the report or where it originated from, the scope and purpose, the manner in which it has been conducted and any other explanatory information
Body	This is the main part of the report it gives an account of your findings and the conclusions you have drawn, details of the research are included such as diagrams, graphs, tables, etc.
Conclusions	A separate summary of all the conclusions you have drawn referring to the relevant finding.
Recommendations	This section may not be relevant to all reports however where specific recommendations are made it is easier to highlight them in this section.
Bibliography	Finally the sources you have referred to; the published and unpublished texts you have quoted from and referred to. List alphabetically as follows: BOSMAN, C.H. 1969 Mafikeng Road Cape Town: Human and Rousseau
Appendices	Lengthy detailed information such as; completed questionnaires, detailed data and case studies. Note: Information is placed in this section as verification of the details mentioned in the report.

Make sure that the layout of your document improves the text and the visual aids.

- ✓ Does your document look nice, attractive, neat, readable?
- ✓ Will it arouse the interest of the reader?
- ✓ Did you make use of headings and subheadings?
- ✓ Did you use numbers or bullets?
- ✓ Are your paragraphs not too long or too short?
- ✓ Do the visual aids enhance the value of your document?

Evaluate the content and information of your document

- ✓ Are the facts stated in your document correct?
- ✓ Did you stay with the purpose of the document or did you add unnecessary information that has no bearing on the document?
- ✓ Will the audience understand your writing?
- ✓ Did you choose the correct type of business document for your purpose?

Checklist

- ✓ Use your checklist form to check that you included everything you intended to include

Lastly, proofread your document to make sure there are no errors.

The next page contains an example of the format of a general report

An Example of the Format for a General Report

PROGRESS REPORT ON THE HIV / AIDS 2002 PROJECT FOR THE

EUROPEAN UNION (EU)

11 January 2005

Written by

Mike Morolo

The Department of Safety and Security

Executive Summary

The purpose of this report is to inform the Department of Safety and Security about the progress made on the HIV / AIDS Project.

The following objectives will be used to measure the progress of the report…

The main strengths and weaknesses are summarised as…

The following recom-mendations were made based on the findings…

Contents Page

---

1. Introduction

The purpose of this report is to…

2. Problem Statement

The incidence of HIV/AIDS has increased by x% in Department of Safety and Security since December 2003.

The EU requested the Department to address problems of …

3. Background to the HIV / AIDS Project

In 2004, the Minister of Health specified that…

The EU took up this challenge by …

---

4. Objectives

The following objectives will be used to measure the progress made on the project…

5. Methodology

A special task team was assigned to monitor the progress of the report.

Interviews were held with the Project Manager and the Project Team Members to assess the extent to which the objectives were achieved. The expenditure was measured against the budget….

---

6. Critical Analysis of the Progress Made

The extent to which each objective has been met will be critically discussed.

- Developing a Department of Safety and Security HIV/AIDS workplace policy before December 2005.
- It was found that an effective policy was developed, but timeframes were not met. The reason…

7. Recommendations

Based on the assessment, it is recommended that…

8. Conclusion

In conclusion…

✓ Be precise in your purpose or intention

- ✓ Remember to include a Table of Contents
- ✓ In the executive summary prove that your report is worthwhile studying
- ✓ Be accurate, honest and objective.
- ✓ Write as clearly and as correctly as possible.
- ✓ Include relevant details and keep to the point. Include additional information under the appendices.
- ✓ Organise, prioritise and logically sequence events and facts and processes.
- ✓ Take aspects into consideration that can influence the reader
- ✓ Include a section to sign off on the report
- ✓ Your style of writing should be impersonal and formal.

The report can be stored for a number of years and used as a reference therefore it must be readable regardless of the audience, the time and the circumstances

Formative assessment 6: individual exercise (SO3 AC1-4)

SECTION 4: VERIFY REPORTED INFORMATION

Outcome

Liaise with relevant parties and verify that reported information is in accordance with requirements and purpose of the report.

Assessment criteria

- ✓ Compile a table listing each of the relevant recipients of the reports, a space for comments and an overall rating of the report in terms of whether it meets their information requirements and purpose
- ✓ Distribute the form to recipients and evaluate their comments to determine usefulness of report
- ✓ Make possible amendments to reports in line with suggestions from recipients

The information contained in various reports is vital for good decision-making throughout the organisation, so the importance of verifying with relevant parties about the content and timing of reports is discussed during this section.

Reporting System

The *purpose* of a reporting system is to give managers

- ✓ accurate,
- ✓ useful,
- ✓ timely and
- ✓ complete information so that decisions can be made.

Each organisation's *requirements* for reporting will be different as the structure and management style differs. The system should, however satisfy the needs of all three levels of management:

- ✓ First-line, supervisory or operational management
- ✓ Middle management
- ✓ Top management

Each level of management will have different informational needs and the system should accommodate all these needs, to enable efficient and reliable decision-making to take place. The type of information and reports, the time frame within which decisions have to be made and the type of decisions vary with each level of management.

Decisions Made By Top Management

Top management make unstructured decisions related to:

- ✓ Strategic planning: the future of the company in terms of growth and expansion
- ✓ Allocation of resources: purchasing capital equipment, leasing or purchasing office space and factories, appointing more staff, spending more on advertising
- ✓ Formulating policies: the policy of the organisation regarding ethics, employee incentives, hiring minorities and so on.

Unstructured decisions are long term, five years and longer, and are based on the subjective judgement of top management and their experience of what happened in the past:

- ✓ What direction will the business world take in the future
- ✓ What direction should the business take. This could impact on the products and services provided by the business.
- ✓ What investments should the company make. This could include acquisitions of existing companies, purchasing of capital equipment and properties and more.
- ✓ How will the needs of consumers change in the future
- ✓ What will competitors be doing in the future

In short, this decision making is based on what top management thinks will happen in the future. Top management will set long term goals for the business. Their need for information is distinctly different to the rest of the managers in the company. They will need information on past performances, trends, consumer needs and how the operations and departments of the business work together, are related to each other and affect each other.

Decisions Made By Middle Management

Middle managers are typically called department manager such as sales manager or Human Resource manager, division manager, plant manager. They have to implement the strategic plans made by top management and their information needs are different to the other levels of management. They need information that will help to plan control the operations required to achieve the goals set by top management.

They usually require weekly, monthly quarterly and annual reports about what is happening in their departments. These reports can include:

- ✓ Sales reports
- ✓ Production reports
- ✓ Inventory status reports
- ✓ Exception reports that indicate when something going wrong
- ✓ Income statements
- ✓ Balance sheets

These reports are called management reports and will be generated at specific times. They can also request on-demand reports to obtain information about a problem or to make a decision about trends or purchasing goods at a better price form a different supplier.

Middle managers are tactical decision makers who implement tactical plans given to them by top management. Their decisions are usually semi-structured. This type of decision is made partly by taking into account routine procedures and business processes within the organisation and partly by the judgement of the manager. These types of decisions require detailed analysis and calculations. Examples would be deciding how many units of a product should be kept on the inventory, how many raw products should be ordered, at what price to order the products, whether to buy a new computer system or network, which software package would best suit the needs of the department, how much money should be spent on the computers, who to buy from.

First Line Management

First line management controls the daily operations of the business: the manufacturing, purchasing, sales, administration and all the other activities that keep the business going. They have to implement the operational plans that are given to them by middle management, such as production schedules, minimum stock levels, minimum sales figures, special sales prices to corporate customers, hiring of staff, staff leave schedules and so on.

They make structured decision based on a well-defined set of routine procedures. Examples include when to allow overtime to finish production on time, when to order raw materials, when machinery and equipment should be serviced, when discount on sales can be allowed.

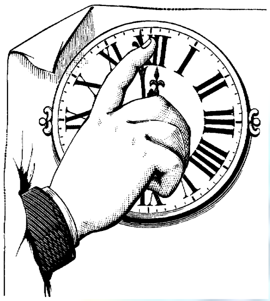
First line managers need information about the current state of activities within their departments: productions schedules, sales records and so on.

Information Needed To Make Decisions

Management makes decisions based on the information at hand. This implies that information should be valuable and have all or most of the characteristics discussed earlier.

Information is collected from *three sources*:

- ✓ Information produced through the normal business activities that take place in the business every day.
- ✓ Information received from either higher or lower levels of management and brought into the equation
- ✓ Information obtained from sources outside the company, e.g. statistics provided by the government, information about competitors such as prices and products, forecasts about trends made by experts



Information will vary in the following aspects, depending on the level of management that requires the information:

- ✓ how much detail and accuracy is contained in the information and
- ✓ how quickly they need the information.

Quoting again the example used earlier in this guide,

- ✓ A sales clerk needs to know that the amount recorded on the till roll is the same as cash, cheques and credit vouchers in the till.
- ✓ The store manager needs to know whether trade is up or down and by how much in each department. The nearest R10 rather than the nearest cent might be sufficiently accurate information for the decision the manager needs to take.
- ✓ The directors may be content to work with figures that are accurate to the nearest R1000. The shareholders may be satisfied with information that is accurate to the nearest Rl0 000. In each case, the information is sufficiently accurate for the needs of those people who wish to use it.
- ✓ Senior managers usually do not require to know how much was taken in the food hall on Monday 18 March, although the department manager would want to know this. To devote more or less space to food, senior managers would want to know whether food sales were increasing or decreasing.

It follows then, that

- ✓ First line supervisors need detailed and accurate information to make daily operational decisions.
- ✓ Top management requires their reports to be summarised, so that they can detect trends and deviations quickly. They do not need the same level of detailed information that first line supervisors require.

Accurate information is essential if a wise and effective decision is to be made.

Each department will also have its own requirements regarding accuracy. Sales reports which are used to determine the commission due to sales people must be 100% accurate, while the warehouse can probably get by on a lower level of accuracy.

The needs of the different departments and levels of management regarding the time span of the reports will also vary. First line managers need up to date reports on a daily basis, while middle management will only need up to date reports immediately if there is a problem that has to be solved. Top management will need reports in time for their planning sessions and will require quick reports only as an exception.

Verify the requirements of relevant parties

From the discussion, we can see that the reporting needs of various levels and various departments in an organisation can differ greatly. It is therefore important that you liaise with all the relevant parties to make sure that:

- ✓ The information contained in reports is what they need – relevant to their requirements
- ✓ The dates of receiving the reports suit their needs regarding making decisions
- ✓ The purpose of the report is relevant to their department and level of management.

To assist you with the administration of reports, we suggest that you implement the following system:

- ✓ Compile a table that lists each of the relevant recipients of the reports. Leave a space for their comments as well as an overall rating of the report in terms of whether it meets their information requirements and purpose
- ✓ Distribute the form to recipients and evaluate their comments to determine usefulness of report
- ✓ Make possible amendments to reports in line with suggestions from recipients

Formative assessment 7(SO4 AC1-3)

110023 Learner workbook: formative assessments

Formative assessment 1: individual exercise

Below you will find an example of a business letter. On the letter, identify the following:

- ✓ Letterhead
- ✓ Date line
- ✓ Reference line
- ✓ Attention line
- ✓ Inside address
- ✓ Salutation line
- ✓ Subject line
- ✓ The body of the letter
- ✓ The closing
- ✓ Signature

There is an error in the letter – identify the error.

ABC TRADING COMPANY

232 Second Street Timbuktu
Tel: (212) 345 6788
Fax: (212) 345 6790
e-mail: someplace@somebody.com
www.someplacesomebody.com

May 18, 2009

Attention Miss White

XYZ Show Company
999 Fourth Avenue
Timbuktu

Dear Sir

DELIVERY OF 2000 PAIRS OF WINTER SHOES

Thank you for your order of 2000 pairs of winter shoes in various sizes and colours. The order will be delivered to your address on 14 April 2...

Kindly note that goods are payable on delivery.

Mr Smith from our office will visit your office on 16 April to ensure that everything is in order.

Sincerely,

YOUR NAME
SALES MANAGER

Formative assessment 2: group exercise (SO1 AC1-4)

1. Find out what reports are required by the college or your place of work and what reports they have to send to head office, or talk to a friend or family member about their place of work and the reports they require.
2. Find out what the format of the report should be
3. Find out how regularly the reports must be sent out
4. Find out what information you will need in order to compile the report
5. Find out where you will get the information
6. Draw up a table, showing each report, what the purpose of the report is, how often it is required and who it must be sent to
7. Draw up a template for at least two reports. The template must be in the format that is required by the college, including the mandatory content headings. Do this in such a way that everyone who has to add information to the report can complete the information on your template. You can do the template manually or on the computer.
8. Write a report about your findings, giving all the information you have gathered and attaching the templates for the reports as well as the table of all the reports that are required. Hand the report to the facilitator.
9. In a group, discuss the layout and contents of the reports. Are the reports easy to read? Do you understand the information that is given in the reports? Who do you think will need the information in the reports? Why would they need it? what do you think will they do with the information?

After the discussion, write a report about your findings. Make sure that you include the purpose of the report, the value of the information to the various departments, how the information will affect their work and the decisions they make, how inaccurate information will affect their work and the decisions they make and how sending the report out late will negatively impact on their work. Hand the report to the facilitator.

Formative assessment 3: group exercise (SO2 AC3

1. In a group, discuss the reports that were identified during the previous exercise. Make notes of the following:
   1.1. Why are these reports needed?
   1.2. Does the college use them for information, making decisions or instituting action plans?
   1.3. How often are they needed?
   1.4. What are the consequences if the report is late?
   1.5. What are the consequences if the information is inaccurate?
2. Write a report about your findings. Include a section about what you have learnt about the importance of reports. Hand the report to the facilitator.

Formative assessment 4: individual exercise (SO2 AC1-2)

1. Create a table showing each report as well as where you must get the information for the report from.
2. Link the information sources to specific headings within the report

Formative assessment 5: individual exercise (SO2 AC1-2)

1. Create a table where you list each information source: the person/s that you will get the information from
2. When are they able to give you the information?
3. What is the deadline for information that has to be included in the report? This is usually a day or a couple of days before the report is due, so that you have time to combine the information and prepare the report.
4. Indicate the level of confidentiality of the information and the report in your table.
5. Find out what the company procedures are for the getting of the information you need for your reports and indicate this in your table.

Write a report about the information you have gathered.

Formative assessment 6: individual exercise (SO3 AC1-4)

1. Choose one of the reports that you identified during the previous exercises. Collect the information from the various sources using the template that you created.
2. Ensure that you obtain all the information on time
3. Combine the information and compile the report
4. Send the report to the various departments in the manner the report is usually sent: e-mail, post, courier, delivery.
5. Hand a copy of the report to the facilitator.

Formative assessment 7 (SO4 AC1-3)

1. Draw up a distribution list in the form of a table, containing the details of the various recipients of your report.
2. Add columns where the recipients can give a rating between one and ten. Request the recipients to rate the report in terms of the following: does the report meet the purpose and does the report meet their information requirements. The recipients must give a rating for each point, where 1 is the lowest and 10 is the highest.
3. Add a column where the recipients can add comments and/or suggestions.
4. Send the distribution list to the recipients. When you get their feedback, write a report about your findings and the suggested amendments that have to be made to the report.