ECONOMY AND EFFICIENCY COMMISSION
REPORT WRITING GUIDE

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INTRODUCTION

OVERVIEW

This document provides a general set of guidelines for the design, style and content of the reports and studies published by the Economy and Efficiency Commission. The material that is presented in this document is not intended to set strict limits on the publishing practices of the Commission, but rather it is designed to provide an overall publishing philosophy that will assist staff in preparing reports that are useful and easy to read.

Although the items that are presented in this document have a logical basis, **it must be emphasized they are not intended to constrain the innovation and imagination of the author in the presentation of the Commissions= ideas and recommendations**.

This document has been prepared to provide staff with a set of guidelines for preparing reports and studies. It is also anticipated that it will become the basis for a continual updating process that is designed to reflect the existing philosophy of the Commission and the advances in document publication technology.

USERS OF COMMISSION REPORTS AND STUDIES

A report or study must meet the varying information needs of its users: the clients, the function, the program or department being reviewed, and the individuals involved in the process. The clients the Commissions reports are: the Board of Supervisors, the County Chief Administrative Office, the County departmental structure, other local governmental agencies, and the public.

To maximize their effectiveness, Commission documents should focus on the needs of a defined readership. In the case of Commission reports or studies, there exist a variety of readers with different needs:

- *Executives with a general knowledge of systems and terminology*. These individuals are mainly interested in the impact of the study on their areas of accountability.

- *Department or program senior staff.* These individuals are directly responsible for responding to report or study recommendations.

- *Specialists.* These individuals are generally concerned with those findings involving their area of expertise.

The author of the report must take into account the needs of these various readers and the information that is already provided to them through briefings and operational unit reports.

PURPOSES OF COMMISSION REPORTS AND STUDIES

The primary purpose of a report or study is to inform the Commission's clients on whether a department, a program, or governmental function adheres to established policies and directions and/or to the generally accepted governmental or business practices that apply to that governmental function or activity.

Additional purposes of a report or study are to:

- identify for clients the need to create or change policies and procedures.
- advise the county and/or departments on better ways to administer organizations or functions.
- recognize and/or reinforce activities that correct shortfalls or exceed client standards.
- suggest and recommend corrective actions when functions do not meet clients' standards.
- ultimately to improve the overall management and operations of local government.

COMMUNICATION CHANNELS

Commissioners and Commission staff use a numerous channels of communication in an attempt to improve the quality of the services provided by local government, e.g. informal suggestions to client representatives during the planning phase and to departmental staff during on-site reviews; formal briefings and discussions with responsible officers on the findings; briefing notes and operational unit reports to managers and staff; a formal report to the clients, the department or program manager being reviewed; and a letter(s) to the Board of Supervisors, summarizing the main issues and recommendations of the report. This document provides a set of guidelines covering only one portion of this communication, the publication of the formal report or study.

MOTIVATION OF THE READER

For the most part the writer should assume that most readers are going to read as little as possible to understand the main thrust of the report or study. Most readers have become desensitized to printed material due to the sheer volume that crosses their desks each day. The writer must recognize that there is competition for their attention and time. In addition, there is evidence that in the general readership population, which is a user of these reports or studies, the level of understanding must be constantly evaluated. Recognizing these barriers is the first step in preparing and publishing effective reports.

This guide attempts to describe an approach that will encourage the target audience to read reports that are published by the Commission and to take action to improve management, operations, and resource use in local government.

In writing reports the author must recognize and accommodate the intense competition for reader attention and time. Authors can control the three factors critical to gaining and keeping attention with:

- *design*
- *writing style*
- *report content*

DESIGN

THE KEY TO ATTRACTING READERS

Design may be the key to attracting readers - particularly the reader who is not particularly motivated. Once attention is captured, writing style and content should be able to maintain this attention. Effective design increases visual appeal and reading efficiency.

VISUAL APPEAL

A report or study has visual appeal when it looks professional and easy to read. That means the reader should develop positive feelings about the report at first glance. The talent and effort that have obviously gone into the report's appearance send strong signals to readers. It tells them the subject is important. It also tells them the readership is important enough to warrant a quality product.

READING EFFICIENCY

A report or study should not appear long, dull or tedious. The proposed design should be interesting, featuring plenty of white space and easy-on-the-eyes lettering. This approach to design encourages the potential audience to read the document. Efficient reports use design techniques to make it easy to find a particular piece of information and increase reading speed, comprehension, and retention.

DESIGN TECHNIQUES

The following techniques have been selected to enhance the visual appeal and reading efficiency of reports:

- use font sizes and styles that are easy to read
- try to limit the line length to 4.5 inches for easy eye travel that is not tiring
- limit blocks of text to approximately 8 lines to prevent skipping and to provide frequent rest points
- providing an adequate amount of white space is not only more comforting to the eyes, but also provides the reader with room for notes
- locate page numbers, headings and subheadings to help readers in searching for specific information; a standardized format quickly becomes familiar and is both easy to scan and will provide additional information
- use header and footer lines to "frame" the text
- place complete topics on one page wherever possible
- print the text using a laser printer and professional publishing software
- capital letters should not be used for emphasis or to highlight key words and phrases because they slow up the reader
- use unjustified text with flush left and ragged right margins, to encourage smooth eye flow
- insure there are no broken words at the end of lines
- insure there are no broken sentences at the end of pages
- insure there are no single lines on the top or the bottom of a page

FORMAT SPECIFICATIONS

Format is defined in this guide as the shape, size and arrangement of text on the page. It identifies the following elements of format:

Guidelines for the Usage of Fonts

- The body: Times Roman 12pt (serif)
- Recommendations: bold
- Headers and footers: not bold - headers: Engravers Gothic 14pt (sans serif) - footers: Engravers Gothic 9pt (sans serif)

Margins

- top and bottom margins: 1.0" and 1.0"
- left and right margins: 1.0"
- If the report is to be bound a binding offset may be required. This will be determined by the type of binding in use. If the binding requires an offset it should be set at 0.25". This results in an inside margin of 1.25" and an outside margin of 1.0"

Spacing

A single space between lines; 2 spaces or tab after bullets; double spacing between topics.

Tab Setting

Tabs are set at 1/2 inch increments: 2.5", 3.0" and 3.5"

Printing

The Commission staff will produce a camera-ready copy of any report or study to be published on single sided sheets. The report will then sent to the County Printing Office to be printed back-to-back, and bound.

WRITING STYLE

"Have something to say, and say it as clearly as you can. That is the only secret of style." (Matthew Arnold)

"To me, style is the outside of content, and content is the inside of style, like the outside and the inside of the human body: both go together, they can't be separated." (Jean-Luc Godard)

"Too much of a good thing is worse than none at all." (English Proverb)

DEFINITION

For purposes of this guide, style is defined as the way content is written. Generally, style consists of tone, vocabulary, syntax, and grammar.

Good style presupposes a writer who knows the subject well, who the readers will be, what is important to the readers, and what the readers need to do after reading the material.

PURPOSE

This guide is not intended to train writers in the basics of style; that can be accomplished through courses and on-the-job coaching. What this guide can do is provide writers with a standard for editing their own reports, or in other words, a Commission guide to writing style.

GUIDELINES

The following items are not necessarily presented in order of importance:

Terminology

Reports or studies must transmit information with precision - precision that starts with consistent terminology. When reviewing reports, look for inconsistencies such as the following examples of interchangeable terms: objective, purpose and goal; functions, activities, areas, aspects and practices; personnel administration, human resources management and personnel management.

Inconsistent terminology demonstrates an unprofessional approach in business writing. It may cause readers to interrupt their reading rhythm to interpret the changed term and misunderstand the message. The results are particularly noticeable in managers with only a general knowledge of the specific organizational functions and/or terminology.

Sentence Length

Another style element that can blur the precision and clarity of text is long sentences. Some grammarians recommend a limit of 15 to 18 words in business writing. In editing reports, one should look closely at sentences with more than 20 words, there may be room for improvement. The following example is from the second paragraph of a section on sub-delegation of staffing authority demonstrates the clarity of shorter sentences.

> **One sentence**: "The roles, responsibilities and accountability mechanisms of managers and staffing officers are clearly defined in the departmental training course on sub-delegation which was given to all managers about to receive sub-delegated staffing authority." (33 words)

> **Two sentences**: "All managers who were to receive sub-delegated authority attended the departmental staffing course. The course defines the roles, responsibilities and accountability of managers and staffing officers." (13 words in each)

Passive Voice

No shortfall in style produces dull, tiresome reading faster than the passive voice. The short example that follows demonstrates the difference between passive and active sentences.

> **Passive**: "Based on the information available, no irregularity of operation was found."

> **Active**: "The audit team found no evidence of irregularity in the available information."

> **Best**: "The audit team found no irregularity."

When reviewing reports, look for a subject - verb - object (agent - action - object) sequence. If it is not there, consider a rewrite.

Intensifiers

Intensifiers are words like: clearly, special, key, well, reasonable, significant and very. Their use should be limited because they frequently lack precision, reflect personal values and fill space for no real purpose. Intensifiers raise questions such as "significant compared to what?" and "clearly according to whose criteria?"

Bullets

Report writers can use bullets as punctuation in front of points to break up dense text and shorten sentences, focus attention, save words and improve logic and flow. The use of bullets is recommended when findings are lists of standards, samples, activities, facts and results.

Example

Without Bullets: "The Department possesses control mechanisms such as a clearly identified responsibility center, consultative committees for target groups and an Affirmative Action Steering Committee. These mechanisms which include action plans and reporting systems adequately ensure the effectiveness of employment equity programs."

With Bullets: "The Department has mechanisms to ensure effective employment equity programs, including:

- X an identified responsibility center
- X action plans and reporting systems
- X consultative committees for target groups
- X an Affirmative Action Steering Committee

This guide takes every opportunity to demonstrate the use of bullets. The nature of reports makes the technique particularly useful in enhancing clarity and readability.

WRITING STYLE SUMMARY

Writing style has many other elements not included in this guide: tone, word economy, and rhythm are just a few. However, the elements covered here have one thing in common, they can be evaluated against readily observable criteria. Reports should be reviewed for the use of consistent terminology, crisp sentences, the active voice, appropriate intensifiers and bullets.

REPORT CONTENT

REPORT EFFECTIVENESS

The sections on Design and Writing Style described ways reports can gain and hold attention and promote efficient reading. The report's content is the major element that is responsible for its effectiveness. In addition to logic, two elements enhance effectiveness, consistent structure and an appropriate level of detail.

STRUCTURE

Reports include the following sections:

- title page
- table of contents
- executive summary (including the recommendations)
- introduction
- findings
- appendices

Title Page

Reports and studies use a cover which provides at least the following information: the title, the Commission=s name and the report's date of issue (month and year). These items can be repeated at the bottom of each page if this fits the formatting of the document. A block is included on the back of the title page to include the names of each Commission member and the individuals or organizations that have provided input to the report.

Efforts should be made to be somewhat creative in the design of the cover sheet. An interesting cover sheet helps in making the report or study unique in its presentation.

Table of Contents

The table of contents lists the sections and sub-sections with page numbers. Generally the table of contents can be considered to be an outline of the report and will thus usually have headers of the major sections as follows: executive summary and recommendations, introduction, findings and appendices (as required).

Executive Summary

The executive summary gives an overview of the condition of the department or the function being reviewed relative to the main issues covered by the report. It is expected that this summary would not normally exceed three pages, including the recommendations. Sub-headings should be limited to paragraphs of approximately eight lines.

Recommendations should be stand-alone statements that can be read out of context and still make sense - particularly to a non-involved executive, manager or member of the public. Recommendations should be specific, identify accountability, measurable, action oriented (amend...; establish...; implement...), reasonably accomplished, and time constrained. Example: "The Commission recommends that within the next 90 days the Chief Administrative Officer establish and communicate to each department a mechanism for controlling position vacancies"

Introduction

Since readers will read the summary, the introduction should not repeat details. It should include, but not necessarily be limited to, the following details.

Context

This section briefly describes conditions of the department, program, or function that exist during the period under review; for instance: the department=s role, size and organization especially with regard to function being reviewed; significant pressures on the function during the period under review - events such as the following should be noted: organizational changes - personnel disruptions - changes in roles and programs; results of internal audits or follow-up to our previous reports, if applicable, etc.

Purpose

This section is a short description of what functions, special programs or organizations were reviewed and what was the authority for conducting such a review.

Scope

The scope lists such items as the period under review, the issues covered in each function and program, the locations visited and the on-site dates.

Methodology

This section briefly describes sampling, data collection techniques and the basis for the Commission=s opinions. It also identifies any weaknesses in the methodology to allow the department or function to make informed decisions as a result of the report.

Findings

This section constitutes the main portion of the report. They result from the examination of each issue in the context of established objectives and clients' expectations. Various models exist as to how the various elements of findings are to be presented.

Appendices

This section can be used when they are essential for understanding the report. They usually include such items as comprehensive statistics, quotes from publications, documents, etc. and references.

LEVEL OF DETAIL

The depth of coverage for issues should normally reflect the significance of the findings. Situations representing a high degree of risk or indicating shortcomings that are serious enough to justify a recommendation should be treated extensively.

Specific initiatives that the study team wish to mention as examples should be described in detail. Issues where the department meets the expectations and there is nothing specific to mention should be dealt with briefly.

COMMENTARY

Where a recommendation and a comment are made under the same issue, they should be in separate paragraphs. Otherwise, they may confuse the reader and reduce the impact of one or the other.

It is normally valuable to use statistics throughout the report. Sample size and error rate mean more when they are given in context. Such data as the size of the population, the number of transactions and the period of time provide a context within which the findings can be evaluated. Percentages should not be used when referring to small samples (less than one hundred). Graphics should be used when they add to the understanding of the text.

CONCLUSION

This guide supports the Economy and Efficiency Commission=s approach to developing consistent reports. It includes the following elements:

- a definition of report users.

- report purposes.

- a design that attracts readers and increases their reading efficiency.

- a writing style with: consistent terminology, crisp sentences, the active voice, few intensifiers and a point system using bullets as punctuation and presenting essential content under standardized headings and sub-headings.

This Report Writing Guide deals with the basic aspects of report writing. It cannot and is not meant to replace the skill, experience and initiative of the author. However, it does provide the basis for consistent and professional reports that meet the needs of the Commission=s clients. In addition, an effective report will encourage managers to improve the use of resources in the management and operations of local government.

APPENDICES

APPENDIX A - QUOTATIONS AND BIBLIOGRAPHY - A PRACTICAL GUIDE

Purpose

The purpose of this appendix is to provide staff members with some useful information on how to present quotations and bibliographical references in reports.

Quotations

A quotation is a fragment of text, or "a word or a passage reproduced from a book, a statement" (Webster's New World Dictionary), that is included in a new text and identified by quotation marks. The source of the quotation can be provided briefly, in parentheses, as in the previous paragraph, or more completely, in a footnote.

Reference - Footnote

The five main elements of a footnote are:

1. Reference Number: an Arabic numeral, placed immediately after the cited text, in superscript.

2. Name: first name and/or initial(s) and surname, followed by a comma.

3. Document Title: written in full, and underlined or in bold.

4. Facts of Publication: publisher, place and year of publication (in parentheses).

5. Text Location: specific location of the text source: usually the page, paragraph or section number.

Bibliography

A bibliography is a list, usually in alphabetical order, of documents consulted or suggested for consultation, or of sources that have influenced or helped the author. It is usually placed in a separate section at the end of the document.

Basic Elements

A bibliographical reference contains four basic elements:

1. Author's Name: contrary to the reference footnote, the surname is written first, then the first name or initial; if there is more than one author, the additional names are written in the regular order, as in the second example below.

2. Title: written in full, with no abbreviation; can be put in bold characters.

3. Facts of Publication: publisher, place and year of publication, as in the footnote, but without parentheses.

4. Collation: length of the work, expressed as the number of pages or volumes.

Bibliography Example:

Mornissey, George L., Effective Business and Technical Presentations, Addison-Wesley Publishing Co., Reading, Massachusetts, 1968, 143 p.

Rosenblatt, Bernard S., Richard T. Cheatham, James T. Watt, Communication in Business, Prentice-Hall Inc., Englewood Cliffs, N.J., 1977, 370 p.

When a document is published on behalf of a government, the country (state, county, city) and the responsible entity are cited as author. It may also be useful to add some information such as the edition number, the name of the legal depositary, or the standard book number.

Bibliography Example:

Canada. Secretary of State. Translation Bureau. Public Administration and Management Vocabulary. Terminology Bulletin #194. Minister of Supply and Services of Canada 1990. 775 p. ISBN 0-660-55655-3. United Nations.

Bibliographical Style Manual. New York: United Nations Publications, 1963. 58p. Dag Hammarskjold Library.

APPENDIX B - ELIMINATION OF STEREOTYPES

Guidelines

Guidelines concerning the representative depiction of minority groups and the elimination of gender stereotyping.

Background

This appendix concerns the application of these guidelines to Commission reports and studies.

Observations

In tables as well as in text, staff we should continue to avoid the use of terms that may be considered offensive or discriminatory, such as "handicapped," etc. In English, it is usually easy to avoid chauvinistic grammatical forms. In many cases, using the plural or passive form will be sufficient to avoid the difficulties of subjects (he, she) or possessives (his, her). The guidelines focus mainly on eliminating certain language forms that have a potentially chauvinistic connotation, such as man-year, policewoman, etc.

Following are a few basic rules and suggestions.

Basic Rules

The guidelines must not be seen as a cumbersome and unnecessary constraint, but as a guide. Writing must remain clear and precise; with a little effort and attention, it is possible to create non-sexist documents that are neither too wordy nor too heavy. When referring to men and women, the principles of equality apply.

Suggestions

Use gender-neutral occupation and position titles: "representative", "police officer" rather than "spokesman", "policewoman". Avoid using the word "man" to refer to people in general ("the man in the street", "man-year") or the masculine form (he, his, him) to represent both women and men. Treat persons of both sexes equally, by varying the position of references to males and females, by using equal forms of salutation in correspondence, and by avoiding unnecessary distinctions between sexes.