9 Formal Reports and Proposals

The distinctions between formal and informal reports are often blurred. Nevertheless, a formal report is usually written to someone in another company or organization. Occasionally it is written for a senior manager in the same company, or for someone with whom the writer has little regular contact. Usually it is longer than an informal report and requires more extensive research. Unless you are a consultant, you are unlikely to be asked to write a formal report often. When you are, there may be a lot riding on it—including your reputation.

The purpose of this chapter is to show you how to write a formal report and how to put together the kind of proposal that often precedes it. As Figure 9-1 shows, many of the elements of formal reports are the same as those for informal ones. You need to pay the same attention to headings, lists, and illustrations, for example. Although much of the advice in the previous chapter could be duplicated in this one, the emphasis here will be on those areas where there's a difference.

Figure 9-1 Contrasting Features of Informal and Formal Reports

	Informal	Formal
Reader	often internal	often external or distant within organization
Length	• usually short • several sections	• usually long (3 pages or more) • sections and subsections

The Four R's of Planning

As emphasized earlier, the first step in planning any piece of correspondence is to think about the reason for writing and about the receiver. For a long, formal report you need to add two more R's to your planning sheet: restrictions and research.

Assessing the Reason for Writing and the Receiver

As discussed in Chapter 2, formal reports are usually less personal than informal ones. They omit the contractions of personal conversation and tend to name fewer individuals. Traditionally, formal reports have tried to give a sense of objectivity by omitting the personal *I*. As a result, passages were often convoluted and difficult to read. While *I*-free reports are still the practice in some circles, business writers are increasingly using *I* in formal reports to produce clearer and more forceful writing. (In informal reports, personal pronouns are not only tolerated but recommended.) However, avoid "I think" or "in my opinion" phrases when you can complete the thought without them:

X

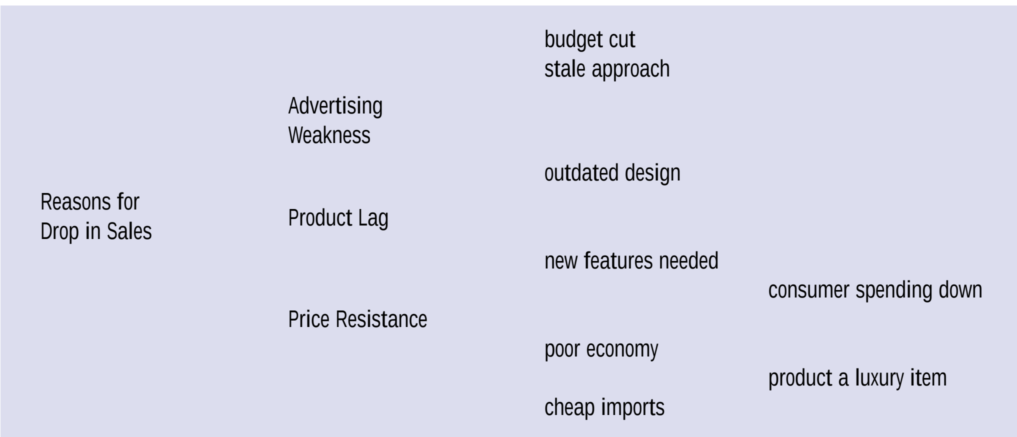
allocating time, you may be wise to leave a margin of error for delays, whether from bureaucratic mix-ups or postal problems.

Deciding on Research

Before beginning your research, explore the subject itself to avoid taking too narrow a path and overlooking important alternatives. Good questions are an effective stimulus for seeing different perspectives on an issue. Here are some ways to start:

1. **Brainstorming** By yourself or with a colleague, blitz the subject. Jot down all the questions you can think of that relate to the topic, in whatever order they occur. Don't be negative or rule anything out at this point.
2. **Tree Diagram** Assume that the subject is the trunk and add as many large and small branches as you can to represent the different aspects of the subject. Again, think of the branches as questions. Tree diagramming can be useful by itself or as a second stage of random brainstorming.

Figure 9-2 Example of a Tree Diagram



3. **Journalist's Approach** In researching a story, journalists consider the

- *Components* How can the subject be divided? How many different ways are there to partition it?
- *Change* What are the changed or changing elements of the subject? What are the causes or effects of certain actions? What trends are there?
- *Context* What is the larger issue or field into which this subject fits? How have others dealt with the problems associated with the subject?

Once you have stretched your mind exploring the possibilities of a subject, move in the other direction. Think of limiting the subject and working out the precise focus of your study. Weigh the time and expense of the research against its importance to the report. Remember that it's better to do a limited topic well than a broad one superficially.

Finding Information

1. **Use librarians.** For some of your research you may have to turn to government documents or academic studies. Librarians can be a great help in finding information or showing the fastest way to get it.
2. **Do a computer search.** Most libraries now have access to extensive databases that allow you to source needed information quickly by computer. For example, a computer search can show you where to find all the articles, books, and reviews on a topic. It can itemize a certain kind of transaction or economic activity over a given period of time. CD-ROM indexes enable you to search by author, by title, or by keyword, sometimes giving brief summaries or even the full text of each article. When you enter the keywords that describe the limits of your topic (for example, free trade, auto parts, Canada), the computer search will list the material relating to that combination of terms. Although much of the same reference material is available in books, your library may not have all of them, or they may not be as up to date as the computerized material. Besides, it's a much slower process to search through books.

   A librarian can guide you to the most relevant database for your topic.
3. **Access information online.** E-mail and the Internet provide access to newsgroups, discussion lists, and forums that focus on specific subjects. Possibly the most powerful research tool of all, however, is the World Wide Web. Using search engines such as AltaVista or Excite or a directory such as Yahoo, you can look for online articles on any subject. Today writing and research is commonly published on a Web site, providing a rich source of information, particularly on current subjects.

4. **Look for inside sources.** If you are doing a report on a particular company or organization, don't overlook the most accessible source of information—internal records and the employees themselves. Many an unsuspecting report writer has spent days searching for facts readily available in internal files. If the topic is one of continuing concern to the company, chances are that someone has looked at it, or an aspect of it, before. Some of the facts from an earlier investigation may be out of date, but it's likely that other information is timely and relevant.

   Even when an earlier report doesn't exist, it is still sensible to find out if other people have worked on the topic. They are usually glad to discuss the issues. A short telephone inquiry or memo may save you valuable research time or give you helpful suggestions for your exploration. Reinventing the wheel does nobody any good.
5. **Check the reliability of information.** Establish whether any of the second-hand facts you get from your research will need verifying. Remember that a source with a special interest may exaggerate or gloss over certain information, often unconsciously. Even statistical data should undergo scrutiny. Any observer of election polls and campaigns knows that while statistics may not lie, they can certainly distort. If you have to get fresh data through a questionnaire or survey, make sure the results are as reliable and valid as possible. If you are not familiar with proper sampling techniques and have no knowledge of statistical reliability, consult someone who is competent in those areas. The cost of obtaining outside help may be less than the cost of losing your credibility through faulty data.

Managing Information

1. **Use file cards.** In doing lengthy research, many people find that file cards are an efficient way to record and keep track of details. Use a separate card for each different item of information you gather—whether the item is an opinion or an important statistic. You can then shuffle the cards according to the order you have chosen for the findings. Drafting the findings section of a report is much easier if the sequence of information is already in front of you.

If you are gathering information from a published source, remember to include the bibliographical information on the card (author, title, publisher, place of publication, and page number) so that you don't have to spend time chasing down the reference later.

2. **Create an outline.** Some writers find that they work best by banging out a first draft as quickly as possible without worrying about details. Others work best when they have a detailed plan in front of them. It doesn't matter what method you choose, as long as at some point you carefully arrange the material so that each little bit is in the best place. Although with a short informal report you may not feel the need for an outline, with lengthy formal reports an outline is almost a prerequisite for avoiding muddles.

   The outline can be in point form or in full sentences. Numbering each section will help you keep in mind the relative value of each. Whichever numbering system you use for your outline, you can repeat it in the body of the report and in the table of contents.

Figure 9-3 Example of a Point-Form Outline

Reasons for Drop in Sales	
1. Advertising Weakness	A. Budget cut
	B. Stale approach
2. Product Lag	A. Outdated design
	B. Need for new features
3. Price Resistance	A. Poor economy
	i. consumer spending down
	ii. product a luxury item
	B. Cheap imports

Organizing Formal Reports

Although many variations are possible, a typical report structure looks like Figure 9-4.

Since you will begin your writing process with the main section, let's begin by looking at various methods of structuring the body of your report.

Main Section

Although the sections will vary according to the subject, the basic principles of organizing are the same as for informal reports.

For readers who will be interested or pleased, use the direct approach. Here is the most common model:

Summary

Introduction

condensed. It’s a convenience for the reader and may be the only part that senior management reads, but the report can make sense without it. For this reason, it’s best to write the summary after you have completed the body of the report.

The summary doesn’t have to give equal weight to all sections of the report. It often has only a brief account of the background or methodology, and may even omit them if they are unimportant. By contrast, it usually pays most attention to the conclusions or recommendations. On rare occasions, if the list of recommendations is lengthy, the title may be simply “Summary of Recommendations.”

Generally in a summary it’s best to follow the order of the report. That is, if the report takes the direct approach, so should the summary. Similarly, if the report has an indirect order, the summary should be indirect.

In the interest of brevity:

- use lists where possible;
- omit examples, unless the example is a key finding;
- stick to the facts, avoiding unneeded references to the report itself. For example, instead of saying, “The Findings section reveals . . .” simply put a heading, “Findings,” and list the facts.

Since there is a subtle psychological barrier to turning a page, especially for a reader who is extremely busy, try to keep the summary to a single sheet. If this seems an impossible task for a complicated or lengthy report, remember Winston Churchill’s instruction to the First Lord of the Admiralty in the midst of the Second World War: “Pray state this day, on one side of a sheet of paper, how the Royal Navy is being adapted to meet the conditions of modern warfare” (Ogilvy, 1983, p. 35). Is your task more difficult than this one?

This section may have a heading other than “Introduction,” depending on the focus, and may have several subsections. It can include several or all of these topics:

- **Scope** Here you define the topic precisely and reveal any assumptions you have made affecting the direction or boundaries of your investigation. If there are constraints or difficulties that limit the study in some way, say what they are. By doing so, you will help forestall criticisms that you didn't cover the area properly.
- **Method** If your findings are based on a questionnaire or survey of some sort, outline the steps you took. Reports with a heavy scientific emphasis often include an explanation of the technical processes used in the investigation. The process of information-gathering is especially relevant when the data is "soft"—that is, open to dispute. Again, if the explanation is lengthy, consider putting it as a separate section.

This is the largest section in most formal reports, and discusses the details of your investigation, the facts on which you have based your conclusions or recommendations. It should be subdivided, with numbered and descriptive subheadings. (It may be possible to give the section itself a more specific heading than "Discussion" or "Findings.")

In choosing the best arrangement for findings, remember that the most effective order is the one that most easily leads the reader to the conclusions or recommendations. As with informal reports, you can arrange findings by category or topic, by geographic or chronological order, or by order of importance.

How many subsections should a report have? It's a matter of judgment. Don't have so many that the section is more like a long shopping list than a discussion. On the other hand, don't have so few that there's a thicket of information in each one.

While some reports have both conclusions and recommendations, many have one or the other. Conclusions are the inferences you have made from your findings; recommendations are suggestions about what actions to take. A long, research-based report generally gives conclusions; a problem-solving report, recommendations. Here are some tips for both types:

- If there are several recommendations or conclusions, separate them in a list or in subsections.
- Normally, put the most important recommendation (or conclusion) first. If you face a skeptical or hostile reader, however, you might make an exception, and put the most controversial recommendation last, even if it is the major one.

- Number the recommendations or conclusions, making them easier to refer to. Numbers will also reinforce the fact that there are more than one. Otherwise, in later discussions the reader may focus on the most important or controversial point and forget that there are others.
- Be as specific as possible about how each recommendation should be carried out and who should be responsible. Some reports have an implementation subsection for each recommendation. Others have a specific action plan at the end of the report, outlining all the steps that should be taken.
- If implementation details are not feasible, consider including a recommendation to set up an implementation committee or task force. If your recommendations do include the details of implementation, suggest a follow-up mechanism so that managers or departments will get feedback on the results.

With the main section of the report in place, you are now ready to add the pages for the front and back sections.

Front Section

Centre the information and arrange it so that it extends downward over most of the length of the page. Include:

- the title of the report, in bold type or in capital letters
- the name and title of the intended reader
- the name of the writer and the writer's title (or the name of the firm, if the report is by an outside consultant)
- the date

A letter of transmittal is a covering letter, given in letter or memo form, depending on whether it is going to someone outside or inside the writer's organization. It provides the extra personal touch that formal reports generally lack. A covering letter is usually brief and follows this pattern:

- an opening statement, "transmitting" the report to the reader and stating its title or purpose (for example, "Here is the report you requested on . . .")
- a brief outline of the major conclusions or recommendations

- a statement of thanks for any special help received from other employees
- a goodwill close that looks forward to future discussion or opportunities to help

Of course, a letter of transmittal can contain more or less than this model. Occasionally, a fairly extensive summary of the report in the covering letter will substitute for a summary at the beginning of the report. Sometimes, if the writer is an outside consultant hired for the job, the letter of transmittal expresses appreciation for the opportunity of working on the task. Whatever it says, however, the letter should have a personal, conversational tone, as the example in the sample report in Figure 9-5 illustrates.

This is useful if the report is over five pages. It follows the letter of transmittal and has no page number. It may be labelled “Table of Contents” or simply “Contents.” List the sections of the report in a column on the left, using the same system of numbering used in the body of the report. If the report has subsections, list these as well. (Subsection headings may be indented a few spaces from the section headings.) In a column at the right of the page, list the appropriate page numbers. If the report itself contains a number of tables or figures, list them with an appropriate label—for example, “List of Tables.”

Reference List: The following examples are taken from the APA Web site on electronic reference formats. They show electronic sources as they would appear in the reference list, ordered alphabetically by the author's last name (or title if no author is given):

Electronic reference formats recommended by the American Psychological Association. (2000, August 22). Washington, DC: American Psychological Association. Retrieved August 29, 2000, from the World Wide Web: http://www.apa.org/journals/webref.html

Jacobson, J. W., Mulick, J. A., & Schwartz, A. A. (1995). A history of facilitated communication: Science, pseudoscience, and antiscience: Science working group on facilitated communication. *American Psychologist*, *50*, 750–765. Retrieved January 25, 1996, from the World Wide Web: http://www.apa.org/journals/jacobson.html

(You will notice that Web sites listed in *Impact* do not follow APA style. For aesthetic reasons, the preferred style of the publisher, Pearson Education Canada, is to leave out the "http://" protocol.)

A For a detailed illustration of the MLA style, refer to the 5th edition of the *MLA Handbook for Writers of Research Papers* (1999). Here are a few guidelines for some of the most commonly used elements of this method of documentation:

1. Citations

   Parenthetical citations are given in the body of the report, giving only the author's last name and the page number, for example (Wilson 25). In a case where no author is named, give an abbreviated form of the title, for example (*Study Results* 43). If there is more than one author, use the first author's last name and *et al*., for example (*Smith et al*. 120).

2. Works Cited

   Complete information about the text citations appears in a list of works alphabetically by the author's last name. Some examples of common items in a list of works cited are:

- Book

  Elliott, D. W. *The Effects of Free Trade on Canadian Business.* Scarborough, Ontario: Prentice-Hall Canada, 1994.

- Journal article

  Patrick, N. L. "The Role of Ergonomics in Contemporary Business Practice." *Business Psychology* 82 (1993): 675–83.

3. Online Sources

To make sure that you have the most current information about the MLA style, visit the Web site at **www.mla.org**. As in the case of print sources, you should put citations in the report that direct the reader to your Works Cited list.

Citations: In parenthetical references in the text, works on the World Wide Web are cited just like printed works. However, since Web documents are often without page numbers you will typically have a citation consisting only of the author's last name or abbreviated article name in brackets.

Works Cited: The following are examples of how some of the most common online sources of information would appear in your Works Cited list. Note that two dates are given for each source: the first is the date when the site was published or updated; the second is the date when you accessed the site.

- Web site

  MLA on the Web. 25 Nov. 1997. Modern Language Association of America. 25 Mar. 1998 <http://www.mla.org>.

- Article in a Reference Database

  "Fresco." *Britannica Online*. Vers. 97.1.1 Mar. 1997. Encyclopaedia Britannica. 29 Mar. 1997

  <http://www.eb.com:180>.

- Journal Article

  "IASC Study of Business Reporting on the Internet." *Management Accounting Quarterly* 78:1 (Jan. 2000). 13 Nov. 2000 <http:www.managementaccounting.com>.

A-- ,

This optional section appears at the end of a report and includes highly specialized or inessential information that may still be of interest to the reader. Tables, technical information, and other complicated or detailed supporting evidence are often put in appendices so that the reader can quickly cover essential information in the report itself. If you do use an appendix, be sure to list it in the table of contents. If you use more than one, list them as Appendix A, Appendix B, and so on.

Finishing Touches

After putting a lot of time and effort into a formal report, make sure that its appearance complements the content. The advice in Chapter 8 on visual impact in an informal report also applies to a formal one. Here are two added suggestions:

1. Consider using coloured paper. If you are producing a long report, different colours of paper will help to separate the different sections visually. A conservative organization, however, may prefer uniform white paper (along

Figure 9-5 Example of a Formal Report

PEMBERTON'S CORPORATE PUBLICATIONS

Prepared for
Leonore Fielding
Vice-President of Operations
Pemberton Manufacturing

Prepared by
Thomas Morgasen
Senior Research Consultant
Curtis Consulting Group

December 5, 2000

CURTIS CONSULTING GROUP

200 Avenue Road Halifax Nova Scotia E4L 1B3

December 5, 2000

Ms. Leonore Fielding
Vice-President of Operations
Pemberton Manufacturing
Paris ON K4N 2T3

Dear Ms. Fielding

The attached report, which you requested on September 1, represents our findings regarding the corporate publications at Pemberton Manufacturing.

Our report includes an assessment of current publications at Pemberton as well as an analysis of the current and future communication needs of your company.

The communications action plan outlined in our report reflects the results of our research both within the company and in the national and international marketplace. We are especially grateful to the Pemberton staff, in particular the members of the communications group, for their input.

I look forward to discussing our recommendations with you and will be happy to meet with you and your staff regarding our report and its exciting implications for Pemberton.

Sincerely

Thomas Morgasen

Thomas Morgasen
Senior Research Consultant

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LIST OF FIGURES

EXECUTIVE SUMMARY

PEMBERTON PUBLICATIONS

INTRODUCTION

In its first year under new ownership and management, Pemberton Manufacturing has undergone major changes, including adopting a new strategy for customer service. As part of Pemberton's company-wide review, this report presents our assessment of corporate publications and recommends steps to increase effectiveness in this period of change.

Our assessment included:

- Extensive discussions with the communications group
- Meetings with senior managers in all departments
- Ten focus groups, each with 15 to 20 employees. Individuals in the groups were selected to represent the various functions and levels at Pemberton. We chose to use focus groups rather than conduct a survey of all employees, since in the preceding month employees had completed a human resources questionnaire and would likely not have welcomed a second one so soon.
- Ten interviews with Pemberton's major customers

ASSESSMENT OF CURRENT PUBLICATIONS

Currently the communications group produces three publications:

1. ***Newsline.*** Pemberton's internal newsletter, published quarterly, covers a whole spectrum of topics, from employee news to industry matters. Our focus group discussions revealed that most employees read it and find it easy to understand. However, they find the news value is limited. Since it is published every third month, most news items have reached them through the grapevine before they read them in *Newsline*.

   Our experience with other companies suggests that this type of publication is most useful for discussion of policies, issues, and ideas for which the "news" element is not as important. It is also suited for complex items, such as changes in employee pension plan options. The ability of the communications group to write

2. **Refocus *Newsline***. With the new online newsletter, the print newsletter would not have to be produced as often. Two issues a year would likely meet the need for the kind of in-depth discussion of policies and issues that the print version is best suited to.

   The present cost of *Newsline* is $19,000 per issue or $76,000 per year. We anticipate an increase of approximately 10% in printing costs which would be offset by the savings realized by printing only two copies a year. This would result in a reduction of costs by approximately $34,000 annually.

3. **Double the number of issues of *Salute*.** Concern for customer preferences as well as for costs suggests an initial experiment of two issues a year instead of one, with a re-evaluation of reader response after one year. Two issues would increase the present annual cost by $35,000.

   Since this publication provides an opportunity to market new products as well as enhance the company's image, the marketing department should be more involved in planning each issue as well as in getting regular feedback from customers.

4. **Reformat the annual report.** Three additions would help to produce a more dynamic, people-focused report, reflective of Pemberton's customer-service strategy:

   - increased use of visuals, including photographs of plant operations
   - interviews with Pemberton employees and customers to illustrate the company's new customer service orientation
   - upgrades of binding and cover design for a more professional look

   These changes would increase the cost of the report by approximately $20,000.

5. **Publish annual report on the Web.** Pemberton's rapidly increasing global market requires the rapid transmission of information and suggests the need for an online report. The company Web site at www.pemberton.com is reporting in excess of 1,500 hits per

month, and publishing the annual report on the site is an obvious strategy for building global communications.

Pemberton's information technology staff have the expertise and the technology to do this; the estimated figure for staff time is approximately $20,000.

CONCLUSION

Overall, the estimated cost of implementing this communications action plan is $56,000 for the next year.

Publication	Current Cost:	(-)	+	Projected Cost
Newsline: e-mail edition			$15,000	$ 15,000
Newsline: print edition	$ 76,000	($34,000)		$ 42,000
Salute	$ 35,000		$35,000	$ 70,000
Annual Report: print edition	$ 47,000		$20,000	$ 67,000
Annual Report: online			$20,000	$ 20,000
Totals	$158,000	($34,000)	$90,000	$214,000

Figure 3

We have discussed our findings and recommendations with the communications group, who think they could make the changes within six months. Given the expertise of current staff and the state-of-the-art technology at Pemberton, the recommended changes would be unusually inexpensive to implement.

In addition, there would be no disruption to Pemberton's current organizational plan. The communications department could implement these changes with current staff experiencing only minor changes in their current job descriptions. There would be no layoffs and no new hires would be required. The stability at Pemberton would continue unimpeded and there would be no negative impact to employees or customers.

If management approves the proposed changes, Pemberton would realize almost immediate gains in productivity and sales at minimal cost.

REFERENCES

Edson, Mark (1999). Internal communications as an HR Tool. *Corporate Concerns*, *65*, 1190-5.

McLean, Eric (1998). Online business reporting for the millennium. *Business Trends*, *49*, 129–143. Retrieved November 11, 2000, from the World Wide Web: http://www.businfo.org.html

Stewart, David H. (1999). Electronic reporting and global trends. *Corporate World, 73*, 248–279.

CHECKPOINT

Presentation graphics programs make it relatively easy to prepare slides and overheads to augment your report. These visuals tend to keep an audience's attention and help to clarify data and illustrate a process or system.

- If you will be pressed for time, it's better to ask the audience to hold their comments and questions until after you have finished. If the meeting is casual and you have lots of time, you might welcome queries as soon as they occur to the listener. Take care, however, not to let the questions run away with the presentation. If you sense the discussion is getting out of hand, ask that further discussion wait until you have finished.
- Since it's always an advantage to have the last word, make sure you bring a question-and-answer session to a close with some conclusion that reinforces your main argument or key points.

Formal Proposals

Proposals may be informal or formal. They vary from a one-page memo for a boss to a massive document for a government department. This section will show how to prepare a formal proposal, since it is usually more extensive than an informal one. If needed, the guidelines can easily be adapted for less formal circumstances.

Planning a Proposal

While proposals can be solicited or unsolicited, most are written in response to a formal or informal request. A formal "Request for Proposals" document outlines the specifications or requirements for the job. When a proposal is unsolicited, the task is more difficult, since the reader will have to be convinced there is a need to act. In either case, however, begin planning by considering:

- the reason for writing
- the reader's needs, concerns, and potential benefits
- the competition

Think of the reason for writing not in your terms ("I want to get the job for the money"), but in the reader's terms: the proposal is a way of solving a problem for the reader or giving a benefit such as improved safety, increased productivity, or decreased accidents in the parking lot. Even if you don’t mention the word *problem* in the proposal—and

FIFESHIRE AND PARTNERS 2

Time Frame

If the construction of your offices proceeds as planned and we can begin this month, we think that you can be enjoying finished offices by the new year. Since the time between furniture order and furniture delivery is often about two months, the sooner the planning begins, the better.

A breakdown of the time frame for completing the various stages of the project follows.

Planning				
	Ordering			
		Lighting		
			Painting/ Papering/ Carpets	
				Furniture/ Accessories
Sept.	Oct.	Nov.	Dec.	Jan.

Our Qualifications for this Project

Internet Issues

Researching Online

The Internet is a powerful research tool, and with it comes a whole new area of Internet liability. Remember to keep the following guidelines in mind when you are preparing your report:

1. **Acknowledge your sources.** It is tempting to think that material on the Internet is public property, but that is not the case. As in the case of paper reports, be diligent in documenting your sources. Methods for citing online sources are outlined in this chapter of *Impact*, and a number of Web sites on this subject are listed at the end of the chapter.
2. **Verify the credibility of your sources.** Anyone can publish on the Web, so be sure to check the credentials of your source. Unless it is a personal Web page, the company, organization or publication hosting the site will be clearly stated.
3. **Ensure that your sources are current.** Web pages should be maintained on a regular basis to keep the site contents up to date. Check the date stamp on the site to make sure that it has been updated recently.

Writing for the Web

Corporate globalization has resulted in a major shift in business reporting. Although paper reports are still commonplace, they are often supplemented and even replaced by electronic reports. Since electronic text takes longer to read, writing for electronic media makes its own set of demands on the writer. If you are publishing your report on the Web you will want to keep the following guidelines in mind:

1. **Use a direct style.** Presenting the most important information first will get your readers' attention and encourage them to scroll down or follow your links for additional information.
2. **Write scannable text.** Since electronic text is more taxing for the reader, use bullets, lists, headings, and highlighting to make the text less dense and more readable.
3. **Make the report easy to navigate.** Readers get impatient if they can't find their way around the site quickly. Make sure that your links work and that every page has an exit.

Exercises

c) Whitfield Industries is another conglomerate in the chemical field. It has heard that Northfield could be up for grabs and wants to buy it. As a consultant reporting to them, you have concluded that this would be a bad idea.

d) Ajax plans to close its Northfield operation (while keeping the Belmont plant open). Your job is to explain the reasons for the decision in a technical report, which will be made available to workers along with the company’

Since you think the information booth would make new students feel more at home, you want the administration to approve and finance the plan.

a) Write a proposal to your college principal.

b) Give the class an oral presentation based on the proposal. It should be about three minutes in length.

4. **Proposing Improvements**

Think of a way in which an activity you have participated in could be improved. The activity could be part of a paid or volunteer job, a sports team, a club, or any other aspect of student life. Write a formal proposal to the person in charge of that activity, suggesting why and how the change should be made. Assume that the person is open to suggestions.

5. **Reporting on Problems and Solutions**

Think of a problem area in a job you have held or in some aspect of student life. Write a formal report to the person in charge of that area, analyzing the problem and recommending changes. Assume that the reader is aware that the problem exists and has agreed to read your report but is habitually cautious and nervous about change.

6. **Writing a Proposal: Summer Work Program**

To help students earn money and gain work experience, the provincial government has agreed to pay 300 students up to $3 000 each to devise and carry out civic service or civic improvement projects. The projects must benefit a needy area or group or the community as a whole. The rules for the program state that the government will pay $8.00 per hour to a student, plus any material costs not exceeding $1 000. Students may propose a joint project with up to four students participating.

Write a formal proposal to Arthur Belmont, Coordinator of the Student Summer Work Program.

7. **Presenting Your Work Program Proposal**

Assume that the members of the class are the committee that selects the best projects for the student summer work program described in the preceding question.

Make a brief oral presentation (under four minutes), in which you try to convince the committee of the merits of your proposal.

Online Activities

1. Paraphrasing a Source

owl.english.purdue.edu/handouts/research/r_paraphr.html

Visit this Purdue University site and read the article on paraphrasing material. Then follow

`www.io.com/~hcexres/tcm1603/acchtml/acctoc.html`

This Austin Community College site is an online textbook with chapters on business plans,

References

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