

Reporting Skills and Professional Writing

4: Planning the Report



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Now we've done all the thinking, we can move onto the next step, Planning the Report. Throughout the thinking process we have regularly seen new ideas and linkages come to light; and identified conclusions and issues of importance that we wish to focus on.

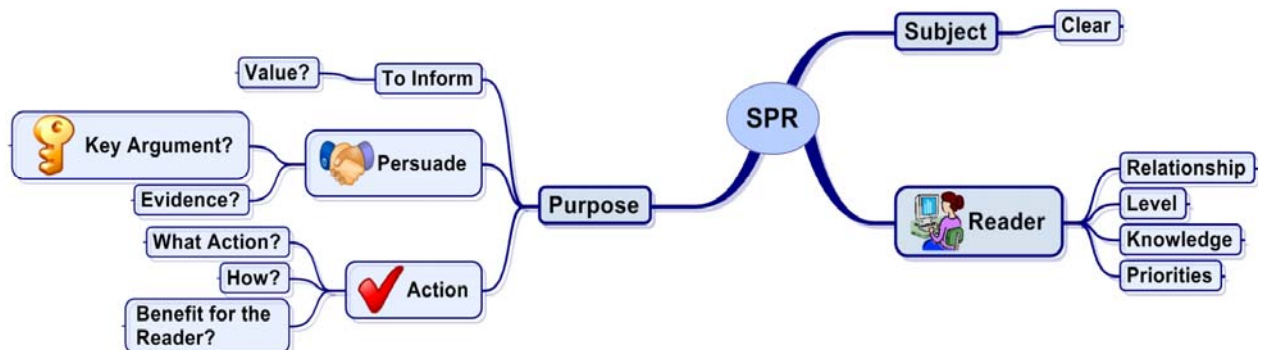
Planning is all about organisation of our ideas and focus – focusing on our Subject, Purpose and Reader (SPR).

This module covers:

- SPR Analysis
- Reader Profiling
- Creating a Structure for your Report
- Using the Mind Map to Plan the Report

SPR Analysis

SPR simply stands for Subject, Purpose and Reader. It's a fairly straightforward series of questions to ask yourself at the planning stage for any writing task. Working through these questions will help you focus more clearly on getting the first draft of your report right – complete, persuasive and well-ordered.



Subject

The S, then, is for subject. This is not really an issue in reporting, as the subject is going to be clear to you. But always make sure that the subject you are writing about is 100% clear to your reader also, for example, by using subject headings and chapter titles.

Purpose

Purpose (P) is something we should have been clear about from the very start when setting our evaluation objectives. Often, this will be specifically laid out in the Terms of Reference for the evaluation. However, if you are not an external consultant, and your evaluation / assessment is either a regular part of programme monitoring / evaluation or due to a specific issue to be investigated, you must be clear about this.

You will have already referred to your purpose several times:

- When selecting methods for data gathering you will have referred to your evaluation goals. You did this in order to select methods that would get data that would answer your questions in an efficient and acceptable way.
- Before analysing the data, you again referred back to your evaluation goals.
- When analysing, we were regularly comparing what we discovered against the benchmark of what we were looking for.
- At the planning stage we again clarify our purpose in writing. It is useful here to express our purpose in a single sentence such as 'The purpose of this report is to ...' We will use this statement when drafting the introduction to our report.

To consider the other points under Purpose:

- If we are providing information, always consider what the value of that information is. How does it contribute to the overall purpose? How useful and relevant is it? Do not provide unnecessary amounts of information for your reader to process.
- If we wish to persuade our reader, we always state that point of view clearly. Identify from your analysis what supporting evidence will bring your reader to your viewpoint. But don't overdo it – provide enough supporting evidence, and resist the temptation to include everything you have found out.
- And, of course, Professional Writing is about action. At the planning stage, consider:
- What action do I want my reader to take?
- How, specifically, will the proposed action become reality? (Time, Place, People, Process)
- What benefits are there for the reader if she takes the recommended action?

Reader

When looking at the Reader (R), we can get lots of useful ideas for better planning our writing. Factors to consider, and their implications, are:

Relationship

What is your relationship to the reader? Have you met, exchanged communication, or never met? This will help you to select an appropriate style for your writing. Your style should always reflect the reader's style: that doesn't mean imitating it, but trying to use a similar style. If you have never met your reader, look at their published reports, etc. Analyse your reader's Fog Index (see the next module on Clarity) to get a 'feel' for their style, and make sure yours is somewhat similar.

Level

By level, we mean what level of familiarity does your reader have with the issues you are describing? This will affect our choice of language and how much we need to explain certain concepts. For example, you can assume that readers who are familiar with your project, or who are working in the same sector, will be able to understand some of the technical terms you use quite easily. However, people working in other sectors may need to have these concepts explained. If your reader is a lay person / member of the 'general public', you will have to be very careful about the language you use.

Knowledge

- What does your reader know?
- What does your reader not know?
- What does your reader need to know?

Many writers waste a lot of time writing pages of useless information which may often be ignored by readers. This information is useless because it is already familiar to the reader or it does not have much relevance. I have seen many documents where – and I say this without exaggeration – many, many pages could have been omitted. Asking yourself these questions can help you decide what is important content for your report – what to include, what to cover briefly, and what to leave out entirely.

Priorities

Finally, priorities, or, what is important? This will help you decide how to organise your ideas. As a general rule, let Order of Importance be your guide when deciding how to present your analysis. Remember, though, that this is Order of Importance for your reader – not for you. You and your reader will have different priorities about what is important. For this, and for the next point, you need to put yourself in your reader's shoes. Try to see things from your reader's viewpoint. Ask yourself 'What questions does my reader have' and then, answer those questions.

A final point is about what to do when we have more than one reader.

The simple answer is to focus on your primary reader – i.e. the reader with most importance / influence.

Extended Task

Consider the Case Study you have been looking at in the last two modules. Work through the SPR analysis and note your ideas in response to the various points.

Children in Nepal

As a senior in-country staff of an international child rights NGO, you have been asked to develop a brief (2 – 3 page) report on the situation of children in Nepal. Ultimately, this document will be included in the fundraising prospectus which is distributed to the organisation's strong funding base in the USA.



Subject	
Purpose	
Reader	
Relationship	
Level	
Knowledge	
Priorities	

Our comments follow the Extended Task on Reader Profiling.

Reader Profiling

The next task helps us to consider how to answer the questions about the reader when we are writing for a 'general' audience, i.e. for publication in the media or in our own advocacy / promotional literature.

Even though the 'general public' is a very broad audience, we can focus our writing better by trying to build a profile of one particular, typical reader.

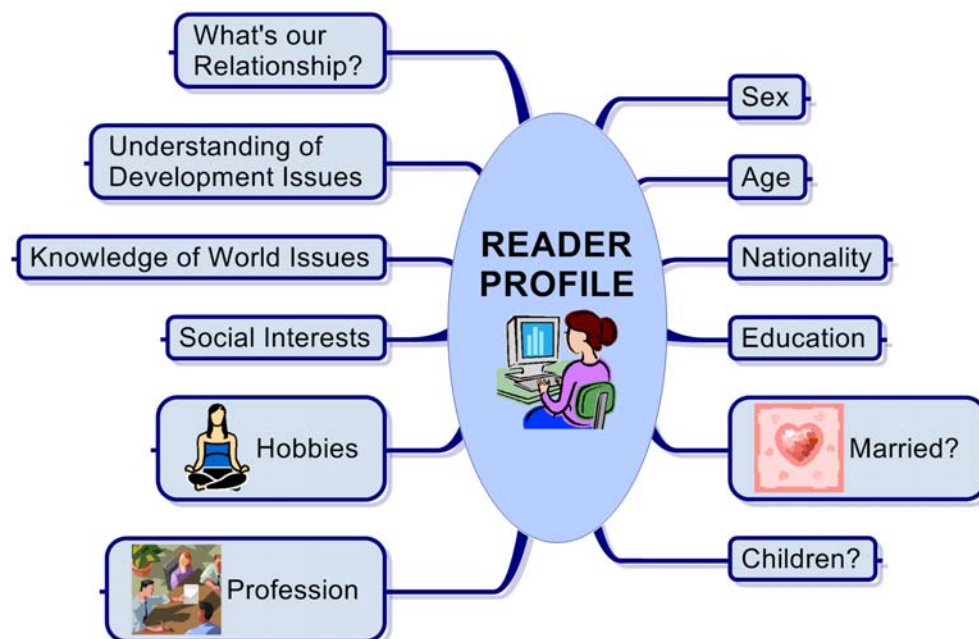
Some of this information may be available to us. The target publication may be able to provide some breakdown of its audience's average age, gender, income, education level, etc. If the target publication is your own organisation's fundraising literature (e.g. a newsletter or prospectus sent to individual supporters), your documentation officer or fundraising manager may be able to provide similar information.

When we write, remember you are always 'people writing to a person. It will help to use your imagination a little to build a picture of your 'typical' reader.

Extended Task

Let's return to the extended assignment.

Use your imagination to build a profile of your primary reader. We guarantee it will help. Here are some broad ideas to get you started.



Possible Solution to SPR and Reader Profiling

You will have possibly come up with something quite different. What's important is that you can visualise your reader, because you must always write to your audience rather than just about a topic.

Reader Profile	
Sex	Our typical supporter is female
Age	Late 30s
Nationality	US Citizen
Education	University graduate
Married?	Yes
Children?	2
Profession	She might be a lawyer, doctor ...
Hobbies	Gardening, aerobics ... though probably too busy taking her kids to soccer practice and so on to have much free time
Social Interests	On Parent-Teacher committee at her children's school, supports local charities, member of Greenpeace, Amnesty International ...
Knowledge of World Issues	Pretty broad – she reads newspapers regularly, watches CNN ...
Understanding of Development Issues	She has a general idea of some issues in developing countries – education, child labour, environment, HIV – but may be less clear about issues such as gender and rights ...
Other Thoughts	
<p>Looking at the 'R' in SPR, we can consider:</p> <ul style="list-style-type: none"> • We do have a relationship with our reader. After all, she is a supporter of our organisation, so she is familiar with our work. • However, we can't expect her to have much depth of understanding or knowledge about our work. Visible issues such as labour, education and health will be easy for her to grasp, but concepts like awareness raising, community mobilisation and rights-based approach may not be so immediately clear. We will need to be careful about what terminology we use. • We should organise our ideas so that we present familiar issues first – issues which she can relate to as a mother, such as children's health and education. • As a supporter of our organisation, she will have one main question: 'How is my support making a difference?' <p>So, while we need to be realistic about the situation and its seriousness, we also need to balance that with what successes and achievements there have been.</p>	

The Report Structure

In this section we will:

- Look at the traditional report structure and consider its advantages and limitations
- Plan a report structure for the Extended Task

Task

Below are the major sections found in the most common reports. Right now these are all mixed-up. First put them in the correct order, and then explain the purpose of each part in the table below.



Part of Report	Purpose
1. Title	
2.	
3.	
4.	
5.	
6.	
7.	
8.	

Possible Solution

We will work through each of these sections in Module Seven ('Putting it all Together'). For now, though, here are some basic explanations.

1. The Title

The Title – or, sometimes, cover page – is more than just a name for your report. Your title should make it clear immediately what the report is about. Other information needed here includes the date the report was written and who wrote it.

2. The Summary

This is a brief overview of the main ideas of the whole report – primarily your conclusions and your recommendations. There is little or no detail here – summaries don't need much in terms of specific numbers and data. Those are in the report itself.

Everyone is going to read this section. For busy readers or readers indirectly concerned with the project, this may be the only section they read – so it has to be complete!

3. The Contents List

This is like a road map, helping readers navigate longer reports and locate the information that is of value to them.

4. The Introduction

In this part of the report you explain to the reader:

- What the report is about
- Why it was written
- Any essential background details
- How you gathered the information (including any limitations you met in your research / investigations)

In shorter reports (with no contents list), you will also outline how the report is organised and whether there will be recommendations.

5. The Main Body

This section may have many different names, depending on exactly what your report is about. This is where we present our analysis *and* data. This section will often be broken down into sub-sections. For example, the main body of a project evaluation report may be divided into:

- Project Preparation and Design
- Relevance of the Project
- Efficiency
- Effectiveness
- Outcome and Impact
- Quality / Sustainability / Replicability

6. Conclusions

Here you include the significance of your key findings only, as well as any lessons learned. These do not need to be supported with data or evidence here, as that will all have been covered in the Main Body of the report. If you follow the advice in the module on Organisation, this will be a relatively simple task of extracting the Topic Sentences. Most of your conclusions will be already clear from your Mind Map anyway, which you completed in the last module.

7. Recommendations

All professional writing is about action, and here is where you state clearly and specifically your recommendations for change. Ensure that *all* your Recommendations reflect *all* of your Conclusions, and are presented in the same sequence where possible.

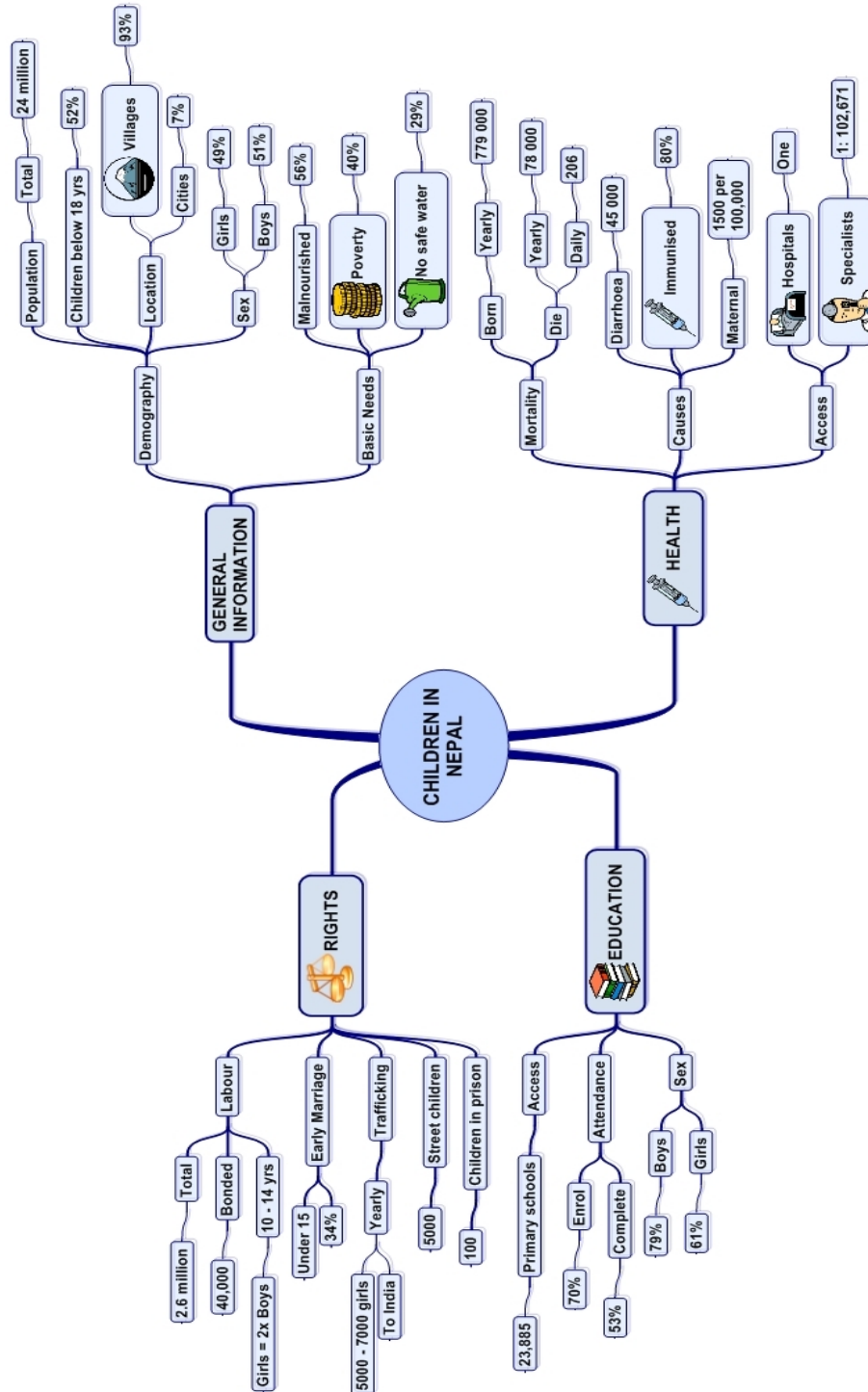
8. Appendices

In this section you can include all data that would otherwise distract the reader from the flow of the report. The kind of inclusions here would be, for example:

- Questionnaires (blank or completed, if not too many)
- Details of evaluation procedure
- Materials referenced in footnotes
- Complete graphs and tables (those in the Main Body will only include the minimum data needed to support the point)
- Lists of organisations and people consulted
- Lists of secondary data referenced

Using the Mind Map to Plan the Report

Here we will just look at how we can use the map to give our report an overall structure / sequence. In the final module ('Putting it all Together') we will look at planning the structure of the individual sections.



Extended Task

Considering the SPR, the reader profiling exercise and the discussion on report structure, how would you organise the analysis into a report? Develop a structure.

Discussion

We suggest:

In the introduction to the report we can include all of the general information. We will probably break this down into two parts: demography and access to basic needs. These belong in the introduction because they present a context for the analysis which will follow; and also because many of the points are linked to various other issues in the map. (When we are drafting we will show you how we can reinforce our reader's understanding by referring to those links each time they occur.)

Considering our reader profile and her level of knowledge / priorities, we would break the Main Body into three sections:

1. Health
2. Education
3. Rights

Our reasons for this sequence are:

Health and Education will be issues which she can easily grasp and relate to her own experience. Rights will contain some things that will be less familiar, so it would be better to present those later.

Our conclusions will highlight:

- The overall situation of children
- The key areas where children suffer

They will also explain some of the cross-cutting issues we identified.

As the action we are seeking is continued support, rather than recommendations, we would end the report describing how our organisation is addressing these issues.

How we organise the ideas in the various sections will be covered in Module Seven, 'Putting it all Together'.

Endnote

This is the mid-point of the programme, and we have now completed the first two steps of the Writing Process – Analysis and Planning. To recap the key points so far, we have learned how to:

- Set evaluation objectives
- Plan the research
- Select data gathering methods
- Analyse the data through a three-step process of:
 - Reading through and questioning everything
 - Breaking down and clustering our data into categories
 - Synthesising our data into a visual map and identifying crosscutting issues and underlying themes
- Analyse our reader in terms of his / her knowledge, interests and priorities
- Profile our reader
- Organise our reports into a consistent structure
- Plan how we will approach presenting our analysis to our readers

The next two modules focus specifically on the tools of a professional writer: Clarity and Organisation. You will learn how to ensure your writing is clear, crisp and to the point; and how to organise your ideas persuasively. We will frequently come back to the extended assignment, as well as provide many other examples and tasks to help you acquire these skills.

In Module Seven ('Putting it all Together') the practical work will increase and we will turn the data into a draft report. And, in the final module, we will look at finishing off the report, and cover issues such as language and style, editing, proofreading, design and layout.

Keep up the good work. The first stages represent the most intensive part of the Writing Process, and the Drafting stage is simply a case of following the plan, organising our ideas effectively and communicating these clearly. The upcoming tools on writing skills are, like everything in this programme, straightforward. You already have more than enough knowledge and skill to write well: we are just going to help you use that knowledge and skill to best effect.

Best of luck with the rest of the programme!