

## Overview

The guidelines presented here should give you an idea of general conventions for writing formal reports. However, you should always consider your particular writing context carefully and let it guide your writing. For example, if you're new to writing reports in your workplace, find out if your organization has a set of report-writing guidelines and look at previous reports.

Whatever your writing context, you should always keep your purpose and audience clearly in focus. Begin by asking yourself

- What do you want to accomplish with your report? What are your key objectives?
- Who will be reading your report and for what purposes? What is their background? How familiar will they be with your topic? What basic information will they need? Do you expect them to be receptive or hostile to your findings and recommendations? What might your readers expect in terms of content, level of detail, and format of your report?

## Report Structure

Letter of transmittal *	The letter may accompany the report or be included after the title page, in which case it is paginated as a preliminary element.
Title page*	<p><b>Pagination.</b> Conventionally, these preliminary elements in a report are numbered in lowercase Roman numerals (i, ii, iii, iv...), with no number on the title page. To do this in MS Word,</p> <ul style="list-style-type: none"> <li>○ Begin paginating your preliminary pages by clicking on INSERT → PAGE NUMBERS → FORMAT (choose lower- case Roman numerals)</li> <li>○ Before p. 1 (the first page of the body of your report), click on INSERT → BREAK → SECTION BREAK: ●Next page</li> <li>○ Begin paginating the body of your report by clicking on INSERT → PAGE NUMBERS → FORMAT (choose normal Arabic numerals)</li> </ul>
Executive Summary*	
Table of Contents*	
List of Figures / List of Tables*	
Glossary (optional)*	
Introduction*	
Methods & other sections in the body of the report	<p><b>Pagination.</b> Conventionally, the rest of the report, beginning with the Introduction, is paginated starting from p. 1, 2, so forth to the end of the appendices. To set up page numbering for your report in MS Word, see the instructions above.</p>
Conclusions	<p><b>Section numbering.</b> It's not necessary to number the section headings in your report, but if you do so using a decimal system, the Introduction should be numbered 1.0, the next section should be 2.0, and so forth, with subsection headings numbered as 2.1, 2.2, etc. The References and Appendices should not have section numbers.</p>
Recommendations	<p>Appendices should be presented as Appendix A, B, C, etc., and each appendix should be informatively titled.</p> <p>* All sections marked by an asterisk in the left column should begin on a new page. All other sections should follow the preceding section on the same page if space permits.</p>
References*	
Appendices*	

## Report Writing: Checklist for Revision

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### 1. Does the **letter of transmittal**

- follow formatting conventions (i.e., using single spacing with a blank line between paragraphs)?
- include all necessary elements, including the return address, date, inside address, salutation, subject line (optional), complimentary close, and signature?
- introduce the report by name?
- acknowledge any assistance received from the recipient of the letter?
- briefly highlight key findings, conclusions, and recommendations from the report?
- maintain a professional tone?

### 2. Does the **title page**

- include an informative title that indicates the focus and nature of the report (e.g., evaluation, recommendation, feasibility study, survey, laboratory report)?
- include the date and the author's name, title, and organizational affiliation?
- indicate for whom the report was written?

### 3. Does the **table of contents**

- list all first- and second-level section headings (and, optionally, third-level headings)?
- reproduce the headings and numbering exactly from the body of the report?
- include the full titles of all appendices?

**Technical tip:** In MS Word, if you format your headings using the “Style” feature (FORMAT → STYLE → Heading 1, 2, etc.), you can have the program automatically produce a table of contents for you by clicking on INSERT → INDEX AND TABLES → TABLE OF CONTENTS

### 4. Do the **list of figures** and **the list of tables**

- list all figures and tables (under separate headings), giving page numbers for each?
- reproduce exactly the numbering and full titles of each figure and table?

### 5. If included, does the **glossary**

- present specialized terms in alphabetical order?
- define terms in a grammatically parallel way (e.g., all in sentences or all in phrases)?

Note that integrating definitions into the body of the report is generally a good strategy.

### 6. Does the **executive summary**

- summarize the report in such a way that it could stand on its own and would make sense to a managerial, public, or non-technical audience?
- stay within one or two pages (preferably one) and within a 500-word limit?
- briefly explain the focus, context, and research method for the report?
- summarize the key information from the report, concentrating on the problem, conclusions, recommendations, and financial implications (if relevant)?
- exclude any information not presented in the report itself?

Note that **abstracts** are brief (50- to 250-word) summaries typically found in research report based on experimental research. They generally address a technical audience and concisely present key information about the study, its methodology, its principal results, and their significance. Some reports may contain both an executive summary and a technical abstract.

#### 7. Does the **introduction** section

- explicitly introduce the report and briefly explain the focus and context for the report? For example, does it explain the problem or opportunity that prompted the report to be written? **Note:** do not assume that the executive summary has already done the job of introducing your report; your report should be able to stand on its own without the executive summary.)
- provide sufficient background (technical information, key definitions, etc.) for general readers?
- refrain from presenting conclusions or recommendations?

Note that the introduction may be followed by related sections or subsections, including

- **Objectives of the study** (often formatted as a list of “To...” points)
- **Scope** (indicating what your analysis includes and excludes)
- **Background** (e.g., about the problem or organization being discussed)
- **Review of research** (literature review)

#### 8. Does the **research method** section

- explain when, where, and how the research was done?
- describe your research method in sufficient detail? For example, if you conducted a survey, did you explain who you surveyed and how (e.g., in person, by phone, by e-mail, via an online tool like SurveyMonkey)?
- include informative subheadings if appropriate (e.g., evaluation criteria, ethical considerations, usability testing procedure)?

#### 9. Does the **body** of your report

- present, interpret, and discuss your findings in a series of sections with **informative headings** and subheadings (e.g., “Environmental Concerns”; “Economic Considerations”) rather than the more generic “Findings”)?
- present findings clearly and coherently, with a brief introduction to each section?
- use lists, tables, and figures (e.g., graphs) to present information where appropriate?
- refrain from presenting conclusions and recommendations?
- include properly formatted **citations for all information taken from sources**?

Note that in research reports, it’s conventional to present results separately from your discussion (and interpretation) of those results. However, in some contexts, it has become common to present and discuss results in the same section. If you’re not sure which approach to use, check with your supervisor instructor if possible.

10. Are all **figures and tables**

- numbered in separate series (e.g., Table 1, Table 2, Figure 1, Table 3, Figure 2)?
- informatively titled (e.g., Table 1: Annual precipitation in Calgary, 1980 - 1990)?
- properly formatted, with the title for tables above and that for figures below?
- accompanied by legends or footnotes to explain abbreviations or provide information necessary to interpret the information presented?
- referred to and discussed in the body of the report?
- accompanied by a source citation, if the information was borrowed or adapted?

11. Does the **conclusions** section

- summarize the most important findings in the report and indicate their significance (answering the reader's implied question "so what")?
- include only conclusions that flow from the data and discussion presented?
- show how the report's objectives have been met?
- refrain from introducing new information?

12. Does the **recommendations** section

- suggest actions that should be taken or considered in light of the report's conclusions?
- present recommendations in a numbered list (if there are several)?

Note that while it's conventional to include separate Conclusions and Recommendations sections, not all reports include recommendations and in some reports, the Conclusions and Recommendations sections are occasionally combined.

13. Is the **writing style** generally characterized by

- sensitivity to the audience (e.g., by including definitions and avoiding jargon for general readers and by using gender-neutral terms and pronouns)?
- paragraphs that begin with a topic sentence?
- straightforward, concise, and natural wording (e.g., "use" rather than "utilize", "now" rather than "at this point in time," and "We" rather than "The writers")?
- precise wording (e.g., avoiding general terms like "a large increase")?
- the use of strong verbs and active voice? (e.g., "The Ministry of the Environment investigated the problem" rather than "The problem was investigated.")
- Note that Research Methods sections are often presented in the passive voice.
- grammatical parallelism in lists and headings (e.g., "We propose to identify the factors contributing to the problem, to evaluate their impact, and to recommend solutions")?
- relatively few sentences over 30 words or two typed lines?
- relatively few paragraphs over a half-page long?
- appropriate use of verb tense (e.g., the past tense to describe work completed and the present tense for conclusions and general statements)?
- a coherent flow, linking new information to known or previously given information?
- correct grammar, punctuation, and spelling? (Hint: keeping generalizations in the plural, e.g., writing "users" rather than "the user," may eliminate some problems.)

14. Are **appendices**

- included as necessary to provide detailed additional information that is not essential in the body of the report but that would be of interest for specialist readers?
- informatively titled and labelled as Appendix A, Appendix B, etc., according to the order in which they are mentioned in the text?

15. Does the **formatting** of the report

- use typography, lists, and informative headings to make the structure of the report clear, the appearance attractive, and the information accessible?

16. Is **information from primary and secondary sources** used in the report

- used effectively (e.g., quoted only if the original wording is important)?
- formatted so that wording taken directly from the original source appears in quotation marks or inset block format (for quoted passages over 40 words)? (Note that following the sentence structure of the original and substituting a word here and there constitutes plagiarism—even when the source is cited.)
- whether quoted or paraphrased, accompanied by **an in-text citation or reference number** acknowledging the source according to a standard format (e.g., **APA or IEEE**) and directing the reader to more complete publication information included in the **reference list**?

17. Does the **reference** list

- follow a standard format (e.g., **APA or IEEE**)?
- list all sources cited in the report (and only those sources)?