General Guidelines for a Formal Report

Choose a topic or project that is program-related, and that involves a need/issue you can describe, analyze and propose solutions for. Remember that your audience’s needs are primary and your report format should always respond to those requirements.

The planning of every report begins with a statement of purpose explaining the goal, significance, and limitations of the report. Since this is a research document, consider topics where materials are readily available. As you acquire research materials, note the documentation information carefully, since this information will be incorporated in your report.

Content/Length:

The completed formal report will consist of approximately 3000 words and will include the following (use headings and subheadings):

1. Letter of Transmittal* (pre-part)
2. Title page* (pre-part)
3. Summary/Abstract* (pre-part)
4. Table of Contents* (pre-part)
5. Main Matter (Introduction/Background, Discussion, Illustrations, Conclusion and Recommendations)
6. List of References * (end part)
7. Appendix (maps, graphs, charts, diagrams, photographs, and other matter not appropriate for the text)* (end part)

* Each of these information areas is a page of its own. The rest (“text”) is continuous. See next page for thumbnail template.
Report Format

A. P. A. Guidelines

Font: Arial or Calibri (or Times New Roman)
Font size: 12
Line spacing: 2 (except for letter of transmittal and title page)
Paragraph: left justified
Margins: Left justified; 1” all around
Headings: APA style headings
Page numbers: Included in Running Head (top right corner)

Figure 1: Thumbnail Template

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Report Content
Letter of Transmittal

A letter of transmittal announces the report topic and explains who authorized it, if applicable. It gives a broad overview of report purposes and briefly describes the project and previews the conclusions. The letter usually describes the primary and secondary research. Such letters generally close by expressing appreciation for the assignment, suggesting follow-up actions, acknowledging the help of others, or offering to answer questions (positive action closing). The margins for the transmittal should be the same as for the report, but in all other areas, should follow conventional letter format. Letters of transmittal may contain personal pronouns and references to the writer. This letter may be attached to the report as the first page (not numbered), or be slipped under the front cover of the report.

Title/Cover Page

See thumbnail template above.

Summary/Abstract

The Summary gives the report reader an overview of what to expect in the report. As well, many abstract services supply only the summaries of technical reports for research purposes. Keep in mind that this section of the report will be read by a larger, less-informed audience, and must be easily read and understood by that audience (briefly define technical terms).

The Summary (also known as Executive Summary, Synopsis or Abstract) of the formal report follows immediately after the title page but before the Table of Contents. It is always on a page by itself and is centred on the page. The Summary is the most important page in the report. It is placed first in the report, but it is written last. The content for the Summary comes from the Introduction (the purpose), the Discussion (highlights), and the Conclusions and Recommendations (outcome or results, and action). Keep the Summary as brief, concise and informative as possible. Leave out detailed support data that is best covered in the report. Data that is part of the main recommendation can be included in the summary/abstract.

Instructions for summarizing your report:

1. Summarize the Introduction by restating your main idea and purpose. This statement should be limited to 25 words.

2. Each headed section in the discussion probably contains one key idea. Find the key idea in each section and summarize it in one brief sentence. Don’t forget to include solutions. Limit this part of the summary to about 50 words. To reduce the length of your sentences, avoid all repetition, wordiness, and gobbledygook.

3. Keep the points in the summary in the same order as they appear in your report.

4. Summarize the Conclusions and Recommendations sections in about 25 words.
5. Edit the summary sentence by sentence. Eliminate fragments, run-ons, agreement problems, and other fundamental errors. Check capitalization and punctuation, and spell-check the entire paragraph. To maintain cohesion, use transition words.

6. The Abstract or Summary should be listed in the Table of Contents.

**Table of Contents**

The table of contents identifies the name and location of every part of the report except the title page and the table of contents itself. A template from your word processing program will enable you to generate a contents page automatically, including leaders and accurate page numbering—no matter how many times you revise. If the table of contents and the list of figures for the report are small, they are combined on one page. Headings should be flush to the L margin, and subheadings indented one tab; it is not necessary to include sub-subheadings in the table of contents. The table of contents is consistently double-spaced. The List of Figures includes tables and figures in one list (unless otherwise indicated). The figure numbers, titles and pages are included.

**Introduction**

The introduction is the first component of the actual report. It details the circumstances leading up to the report and the reasons for the report. Use Introduction as the major heading for this main part.

Divide the content into four parts under the subheadings Problem, Background, Purpose and Scope.

1. The problem (or needs analysis) focuses your report by presenting the topic, pinpointing the approach, and letting your audience know exactly what the report will cover and what approach will be taken. This statement is like a thesis. State the topic that you will be dealing with and mention how you will address it and what the solutions are. Try to stay under 50 words, and use no more than two sentences.

2. The background section describes the project. The background lists the circumstances leading to the present situation and why the project or study is necessary. Include any general information that might be needed to interpret your findings. (similar to background of the pyramid – who, what, where, when, why, how)

3. The purpose statement addresses the major factors that you had to keep in mind and states what you will do in the report. This listing or description should be in the same order as the information is presented in the body of the report. You could mention how the main sections of the report are divided. Use specific verbs like describe, explain, analyze, present and recommend, to explain your actions.

4. The scope outlines the limitations such as cost, time and other factors to indicate the circumstances that prevented you from getting information. This section can be included as part of your purpose or background section. The scope also addresses the boundaries of the report as well.
Discussion

1. This section should set out the technical data, illustrations and details that support the rest of your report. Be sure that it contains all of the pertinent information that will convince your audience to follow your recommendations. A good discussion section should be organized in easy to follow subsections that move from facts and data to the analyses of that data. Set out the information in such a way that your audience can follow (and hopefully, agree with) your analyses.

2. Use the heading Discussion and then follow on the next line with a relevant “talking” subheading. Note: This is an A. P. A. guideline; often in business report writing, “Discussion” is not included as a heading. Instead, a descriptive “talking” heading is used.

3. Organize the subsections in this part under separate subheadings.

4. Most data should be presented in paragraph form. Where listing is used, the list must be introduced by a sentence.

5. Order your information in a recognizable pattern—chronological, special, cause & effect, classification, comparison, definition, process description, etc.

6. Incorporate illustrations into the report body to make technical information accessible and easier to digest.
   - Refer to each illustration in the text (...as shown in Figure 3).
   - Place illustrations close to textual references.
   - Number each illustration consecutively
   - Include a title, legend (if required) and a source reference.
   - Ensure that all illustrations condense data or enhance the text.

7. Place supplemental detail in appendices.

Conclusions

Long, complex reports usually have separate sections for conclusions and resulting recommendations.

1. Sum up the findings in the order they were introduced in the report. The conclusions must present no new information and should start with the most important conclusion.

Recommendations

1. Do not start a new page for this section.

2. Use this section to advocate any action based on your findings.

3. a) Introduce the list with a full sentence.
   b) List the recommendations.
   c) Begin with the most important recommendation first.

4. Feel free to use first person in the recommendation.
Appendices

Extra information that might be included in an appendix is such items as a sample questionnaire, correspondence relating to the report, diagrams, maps, other reports, and optional tables.

1. Each piece of supporting data is listed as a separate appendix. Essential information will be in the body of the report. The appendices should be used only for information that has a specialized audience or that is not essential.

2. Appendix is the main heading for this major part. The word Appendix should be followed by the capital letter indicating its rank (e.g. Appendix A).

3. Under the major heading place a descriptive subheading. If the material is taken from a source, indicate the source in a note at the bottom.

Documentation

Create a References page including any secondary sources of information in the report. Refer to APA Style Central in the ENGL 250 Centennial Library Guide for further documentation guidelines.
References

This information has been compiled from notes prepared by the English Department faculty as well as information contained in:


