

PURPOSE OF THE TOOL

As part the Terms of Reference for an EoT assignment, which has been agreed with stakeholders, may be the requirement to submit a written report. Reports are an important part of the EoT process as it contains information and recommendations that are need for decision-making. Although you can outline your findings and recommendations during an oral presentation, it is usual and more effective to provide a written report. This will enable decision-makers to discuss the information obtained and your recommendations.

The purpose of this tool is to suggest guidelines for presenting your report.

DESCRIPTION

To enable your stakeholders to benefit from your EoT assignment, it is essential that your report is readable. Information should be presented in a way that is easily understood by those involved in taking decisions that are based on your findings and recommendations. So, however relevant and detailed the information, and however sound your recommendations, it is essential that you write the report with style and substance. Since reports are often formal, official documents, they are usually written using formal language. Nevertheless, taking into account the roles, responsibilities and status of the stakeholders who have to read it, you can:

- Use a style that is well structured and simple to read. A lack of jargon and using familiar vocabulary will help readers' understanding. They may be reading the report in a second language.
- Be tactful when describing problems and their causes. Don't offend people who are likely to be involved in either taking decisions, or implementing them. You need their active, willing participation - not indifference and resentment.
- Help people to feel a sense of ownership of your findings and recommendations. Include in your report references and contributions by stakeholders, members of staff, beneficiaries, customers, etc.
- Rather than using formality to present your findings, include examples likely to be of interest to readers of your report. Consider using analogies to illustrate what might be a complex, sensitive situation.
- Be aware of your relationship to the stakeholders. Although you are acting on their behalf, as an EoT specialist, your status will be an important factor. Avoid allowing your style to become subservient, when dealing with senior people. Equally, don't become patronising or authoritarian to others subordinate to you.
- Use positive, objective and direct recommendations, based on substantive findings. Each recommendation should be a basis for action that is acceptable, practical, realistic and motivating to all concerned.

- Wherever possible, write your report on a computer. This will allow you to compile the report where sections can be patched together in an acceptable structure. Use grammar checks available with word processing programmes to help simplify content.
- Initially, submit a draft report so that your stakeholders can comment on the content. This will enable you to allow for their views when carrying out a final edit.

HOW TO USE IT

Although there's no standard format for an EoT report, the following headings are likely to feature in a report structure:

Title Page Clearly state the subject of the report, also references to stakeholders, associated client organisations, authors and date.

Contents Page List headings, subheadings and appendices.

Summary of Recommendations

Refer to numbered paragraphs in the text. Give particular emphasis to recommendations, where these are described in detail.

Terms and Abbreviations

Inevitably, the report will include terms, abbreviations and jargon unfamiliar to some readers. List these with a brief explanation.

Introduction The purpose of an introduction is to describe the reasons for carrying out the EoT assignment and what it is intended to achieve. It may be appropriate to outline how information was gathered and what limitations, if any, were imposed.

Foreword For some reports a foreword, written by a senior person can add authority and support to findings and recommendations. However, there is a risk that a foreword includes irrelevancies that may distract readers' attention.

Acknowledgements

Record the names and designation of the people involved. Particular reference should be given to stakeholders, followed by others who have helped.

Terms of Reference

These should be stated, as agreed with stakeholders, whose names and designations should be included. Note any changes made during the assignment.

Main Text This is the most important part of the report. It must be organised so that it is accessible, well presented, and easy to read. Use main headings and subheadings to highlight significant features or chapters of the text. Consider linking these to specific performance issues, functions, working groups or stakeholders. Remember that people may only read those parts of the report directly relevant to them.

It is important to note that the main text is presenting an explanation of the process you've used, along with your findings, conclusions and recommendations. The emphasis should be on the description of significant issues to which you wish to draw attention, rather than the tools you've used. Any reference you make to EoT tools should be brief or, when considered necessary, details included as an appendix.

Executive Summary

Busy decision makers usually want to grasp the point of a report without having to read the whole thing. They are likely to become impatient if a summary is not provided and may not bother reading the report at all. The summary should consist of one page and done after the main section has been compiled, not before.

Appendices

Also known as attachments, annexes or exhibits, appendices allow you to cater for a variety of readers. You should aim to keep the main text as concise as possible, with details presented separately where they will not interfere with the main flow of the report. Appendices can include completed EoT tools, data and information obtained from interviews.

Appendices can be referred to as 'see Appendix A', or 'details are shown in Appendix B'. Normally, appendices are designated by letter rather than numbers.

Numbering

As EoT reports are likely to accumulate within an organisation, where cross-referencing is an advantage, a standard number notation should be used. The most common system is paragraph numbering. Each paragraph has a sequential number, starting with 1 and carrying on through the text. The advantage of this system is that any paragraph can easily be identified and located, and thus discussed at meetings, or by telephone, or emailed.

Numbering is best done after the main text is written and a summary of recommendations drafted.