Practising Workplace English

Only study guide for

ENN1504

Chair of the Department of English Studies
Professor DNR Levey

Manager: Unit for Applied English Language Studies
Mr JD Proctor
012 429 8467

Course Co-ordinator
Ms Shandu

Compilers
Mr JD Proctor
Ms LM Masehela
Dr JE Mitchell
Ms I Fouche
Ms T Westbrook

Learning Developer
Dr JE Mitchell

University of South Africa
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Ms I Fouche
Ms T Westbrook

Learning Developer
Dr JE Mitchell

Editing
Ms E Donaldson
Mr BCO Ohwovoriole

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General introduction to the module

Welcome to ENN1504 – Practising Workplace English. This module is designed to support your efforts to improve the quality of your written communication in the work environment. The course is taken by students enrolled for a wide range of qualifications in both public and private sectors. We refer to the kind of language appropriate to both sectors as 'business English'; you will explore the meaning of this as you progress through the course.

Our focus is on *clarity* in the work-related documents we produce, so that our readers attend to the content of our messages, and are not distracted by flaws in the way we have written them. To achieve this quality, we need to practise and develop the skills involved in producing documents frequently required of us in the workplace, including letters, memorandums, email, reports and documentation relating to meetings.

Note that we do not deal directly and in depth with some of the more specialised texts relating to academic disciplines and careers such as law, public relations, media studies, etc., as you will have opportunities to learn about these within those fields. You will, however, be able to apply the skills and strategies you practise here in your academic work and in virtually any organisational context. Your writing skills and proficiency in English will continue to develop long after you have completed this course.

Your Study Guide contains the following units:

This introduction presents the assumptions upon which the design of this course is based. Of course, your own thoughts on the subject may differ. What is important is that you develop your own understanding so that you can take control of what you are learning, and how you are learning it. Some reading and thinking before you begin the practical work is necessary.

We assume that students who have reached university level are able to convey what they mean in English, though not always in the most suitable style or without grammatical mistakes. Since our main focus is on the production of work-related documents, these are the aspects of the language we would like you to attend to. Although minor grammatical mistakes and flaws in style are not always problematic, correct and appropriate use of the language is generally preferred in business writing.

Learning language does not mean that we must memorise a set of rules and consciously apply them whenever we need to produce a sentence. It is enough that we notice particular features of the language and let 'human nature' do the rest. We might, however, need to encounter the same feature many times and in different circumstances before it becomes part of our 'automatic' language system.

It can happen that when we are exposed to incorrect language, or experiment with the language ourselves, and are given no feedback indicating an error, this error becomes part of our language system. When this happens, it is usually not enough to become consciously aware that it is an error – we are likely to find that we automatically use the error despite what we know. It is also almost impossible to 'unlearn' what we have learned. Perhaps the best way to deal with such errors is to learn the correct form alongside the error, and practise using it until our 'automatic system' retrieves the correct form when we need it. In much the same way, we retrieve and produce different styles of English to suit specific needs and situations.

This is not to say that rules have no value. They do describe features of language accurately and clearly, so we notice how the language works. Once we have done this, we can 'forget' the descriptions – our internal language systems create their own rules for language production.

We also assume that you have learned at least as much English outside the classroom as in it, and perhaps more from listening and speaking than from reading. If this has been your experience, you might find that writing in English is more challenging than speaking the language, and that you sometimes put 'spoken English' on paper. You will need to develop your ability to distinguish between the two modes.

Listening and speaking are in our nature and to a large extent we learn naturally; reading and writing are 'man-made' activities, and we need to make a conscious effort to develop these skills.

We can speak in 'bits and pieces', using single words and short phrases when we want to. We can use shortened forms of words (contractions), like *can't* and *don't*. We can use facial expression and gestures to support our use of language. We can build on what we have said as we go along in the conversation. Little mistakes are usually not an issue, since people realise that we don't have time to consult dictionaries or carefully edit the way we express something. We can also use informal or non-standard expressions like *come up with (informal)*, or *can be able to (non-standard)*, and no one seems to mind.

A written text is not supported by facial expression and gesture in the way that speech is. Readers, especially in the business world, expect a higher standard of *language correctness* and careful *organisation of information* in our writing than in our conversation, because when we write we have time to make improvements. People expect us to use this time to organise our information and correct mistakes before we give them something to read. If we approach a writing task in the same way that we engage in conversation, the result is likely to come across as 'sloppy'.

When something is not clear in a conversation, you can ask for immediate clarification. A written text must be carefully prepared because it can't respond to a spoken question in this way. Unlike conversation, it is often a 'once-off' communication, and the text should be as complete as possible. On the other hand, we don't want to take up more of the reader's time and effort than is necessary. In conversation we can use words and phrases by themselves; in writing we use complete grammatical sentences.

English in print is more or less the same all over the world. A written text does not show whether the writer speaks English as a home language, or comes from an area where there are local variations in the language. Readers do not make allowances for individual circumstances. More allowance is made for differences in the ways people speak English.

Many of the mistakes we make in writing come from spoken English. For example, the run-on sentence (statements joined by commas) is spoken English on paper: "He came to my house, I asked him what he wanted." Spelling mistakes such as "intergrate (for integrate)" and confusing similar words like "quite (for quiet)", "accept" for "except", or "suppose" for "supposed" reflect speech, where the sound doesn't help with the written form, unless you look very closely at the differences. Non-standard usage like "return back" or "do an application" or "the security" are learned from conversations, not from books. Flaws in writing style such as "lots of" or "She thinks it's OK" reflect the informality of conversation. Note that non-standard usage is passed on and learned as 'correct English', and is not necessarily a set of mistakes that you have made yourself. Nevertheless, you will need to identify spoken English and replace it with the form appropriate to writing in your workplace documents.

This course presents an opportunity for you to spend time revising, editing and proofreading short texts that you have drafted, or that others have written. This time allows you to develop your abilities so that you can produce better quality work when you have to write under pressure at work, or in an exam. This approach implies that you will not gain much if you look for information that you can study shortly before the examination; a quick glance at the writing tasks will not help either. In order to develop your writing skills you need to practise your writing over time.

Clear writing supports the business function, i.e. we write to get the job done, and not because anyone should notice how we achieve this. The skills and strategies that lead to the finished product do, however, concern you as the writer. You will learn to choose and adapt conventional text types and formats to suit your writing to your purpose, the matter you are writing about, and all probable readers of your documents. You will work on a range of skills involved in the process of writing, including strategies to plan your text, provide information that supports your purpose, and to produce a draft document. Then, on the basis of a critical evaluation of your draft, you will revise, edit and proofread to ensure that your document is ready to submit.

In preparation for your own writing, you will be asked to work on given draft documents. These exercises have value in their own right, since we often work with colleagues to finalise documents in the work environment.

The writing tasks you will encounter on this course generally have no single correct answer; you will need to evaluate responses from other writers in relation to your own writing. You will learn more effectively if you draw on your own abilities before you analyse the alternatives or models provided.

Key to icons

The following icons are used throughout the study guide to indicate specific functions. In each case the *Activity* and *Feedback* icons relating to a particular writing task will have the same numbering.

Activity 1.1

This icon indicates that you are required to complete certain tasks which will assist you in your studies. The first digit indicates the unit of the guide; the second is the activity number.

Feedback – Activity 1.1

The feedback icon indicates a suggested response or comment relating to the activity that immediately precedes it, with the same number.

Study Unit 1

Writing skills in professional correspondence

Letters, Memos, Email and the Curriculum Vitae

1. Introduction to business writing

Professional correspondence supports business productivity. Your goal is to use language successfully to support the management of tasks, accountability and time. This will contribute to the quality of decisions taken, and to the quality of the product or service provided by your organisation. The following guidelines will help you on your way!

2. Features of good business documents

Clarity of meaning

Throughout this course the emphasis is on clarity of meaning – the most important feature of good business writing. Clarity of meaning is the combined effect of the following qualities:

- **Structure** refers to the organisation of the text so that it reflects the various components of the message content. It is our responsibility as writers to organise the text so that readers are spared the effort of sorting the ideas and information into a sensible framework. We generally use headings, subheadings, paragraphs, and a range of formatting techniques to structure text. For example, we write in paragraphs because we and our readers *think* in 'paragraphs'. i.e. we consider one aspect of the content at a time. Familiarity with various types of document and the related format (layout) conventions that have developed over time is helpful, but there are few fixed rules or recipes to follow. The following structure is frequently used, but remember that you will need to exercise your own judgement and adapt to particular circumstances:

  - Begin by stating your request, objective, need or problem.
  - Describe the context or background.
  - Give accurate information in support of your reasoning, and motivate your request or suggestion.
  - Suggest the response that you need from the reader, but be careful not to dictate or instruct.

- **Conciseness** requires that we do not write more than is necessary to achieve the purpose. Taking too much of our readers' time is expensive and inefficient, and obscures what is really important.

- **Completeness** implies that, although we should be concise, we do need to include everything that is useful and necessary. Having read your document, the reader should not have to ask: When? Where? Why? Who? What? How?

- **Appropriateness** refers to using language that suits the business objective, the subject matter and the likely readers of your document. This is reflected in your writing style. Aspects of style include the degree of formality, the tone (reflecting the writer's attitude), the discourse and register (the type of language and range of vocabulary generally used in a particular field, community or context).

  Language used in the general marketplace differs from the scientific language used by the medical profession in hospital administration, for example. Where your writing is factual and objective, you should adopt a neutral tone, but indicate a business-like and positive approach to any difficulties encountered. Your approach can be assertive, but aggression and negativity are likely to produce resistance to your objective. Avoid "poetic", emotive language that relies on adjectives, similes, metaphors and repetition, and avoid humour. You may, of course, be creative and appeal to emotion where your purpose is to market a service or sell a product.

- **Language accuracy** describes the use of grammar, spelling and punctuation that is internationally considered correct in the work environment. Correct usage makes the text easy to read and comprehend; the reader is able to attend to the contents of the message without distraction.

Note that these are the criteria by which we critically evaluate and assess the quality of a piece of writing. You will use them to identify ways in which you can improve on a first draft; any assignments that you submit will be assessed by the same criteria.

3. Writing skills

The writing process involves a range of skills that we need to understand and practise in order to ensure a quality product. You will notice that these skills relate to the criteria for good writing that we have identified above.

Planning involves thinking in various ways about **what** we want to communicate, and about **how** we can organise our text, i.e. thinking about content and structure in the context that surrounds a particular writing task. This is the pre-writing phase of the process.
Thinking creatively to generate ideas is often called *brainstorming*.

In this kind of thinking we free our creativity by not judging whether an idea is good or bad. We aim to open up possibilities that we can later explore and develop, or reject. We can *brainstorm* individually and mentally, by participating in a group exercise in which notes are made of all suggestions that arise, or by 'free writing', i.e. writing down our thoughts on a topic as they occur to us.

Critical reflection is the kind of thinking that we adopt to evaluate, select, and to cluster ideas that are closely related. Various techniques can be used to begin structuring our content: grouping key words; drawing mind maps, diagrams or flow charts; deciding on the topic for each paragraph; or deciding on a format with a set of headings and subheadings we can use for longer and more complex texts. Use whichever strategy you find helpful, but remember that planning does not mean producing a document in your head, which you will then put on paper. Your thinking will develop as you write, and the best of plans will need adjustment. Writing is an effective and systematic way of refining your thoughts.

We can, of course, produce a first draft with very little planning, and without using any of the suggested techniques systematically, but then we will probably need to spend more time revising, editing and proofreading our document.

In evaluating our thoughts we need to keep in mind the people who are likely to read the document, about the subject matter, and about what we want to achieve.

Research: Identify a variety of sources from which we collect information, and integrate it into a coherent text. Our views and suggestions should be adequately supported by this factual information.

Draft: Decide on the type of document and format best suited to the task, and write a first draft with attention focused primarily on the *content* of the message. Remember that this is a *working document*, and not the final product. We will improve on the way it is presented.

Revise the first draft by thinking critically about the way we have selected and structured the content. We need to keep our objectives and readers in mind. We might need to add detail, or to summarise what we have written to ensure conciseness. Summarising is central to all business communication and serves to support management so that business matters can be quickly understood and managed.

Edit: Look critically at each sentence, and where necessary improve the *sentence construction* (grammar and vocabulary) and *writing style*.

Proofread: Check the text for mistakes in spelling, punctuation and keyboard use.

The table below shows how specific writing skills relate to the qualities of good writing that we have identified.

ASSESSMENT CRITERIA

Alignment of content and structure: • Content: Information accuracy and completeness. • Structure (paragraphing, subheadings, format conventions). **Writing skill: Revision** – rework the initial planning, information collection and organisation. Where necessary, add detail or summarise.	• Appropriate writing style. • Grammar – vocabulary and sentence construction. **Writing skill: Editing** – improve style and sentence construction.	• Language accuracy: error-free grammar; spelling; punctuation; typing /handwriting. **Writing skill: Proofreading** – correct minor mistakes in grammar, spelling, punctuation and keyboard use.

Revising a draft document ensures that the content is well structured; that there is sufficient factual information to support your position; and that there is no unnecessary detail. The sections and paragraphs are parts of a coherent document fit for its purpose. **Editing** the sentences contributes to the readability of the text and ensures that the writing style is appropriate to the context. **Proofreading** ensures that there are no distractions, so the reader can attend to the content of your message rather than notice mistakes.

Notice that there is a general progression in the writing process from content and meaning to the finishing touches we put to the document. It would make little sense to proofread a text before you revise and edit it, as you would have to check the later version for mistakes again. Nevertheless, there is no reason why you should not pause to correct a mistake when you notice it at any stage of the process. Writing under extreme time pressure, when your first draft has to be submitted as the finished product, you have no choice but to exercise your skills mentally and more or less simultaneously – as you write. The greater your skill as a writer, the less problematic this will be. Wherever possible, make the time to work thoughtfully and learn as much as possible to prepare for these sometimes unavoidable situations.

We can now illustrate this discussion by taking a close look at a practical example. Read the following draft memo from the manager of a small supermarket to his employees and the analysis that follows. Our task is to revise, edit and proofread this draft.

MTHATHA SUPERETTE

MEMORANDUM

TO: The staff REF.: S/12

FROM: The Manager DATE: 12/10/02

STOCKTAKING AND FUN DAY

As you all know that its once again time for our annual stock taking. To complete the task, we will be working on Saturday the 17th of October and Sunday the 18th of October from 08h00 to 6:00pm. Please put your name on the list in my office before 15 October and indicate whether you want to work on Saturday or Sunday. A light lunch will be served and tea and coffee will be there. Remember the fun day to build team spirit on Saturday, 16 November at the Mthatha recreation club. We need to enter 4 (four) teams each consisting of six members. It promises to be an entertaining and fun-filled day with plenty of physical challenges and mental stimulation. The activities includes races and obstacle courses ect. It starts from 8 o' clock until 17:00. Please decide on your teams and each and every team must choose a team leader. Entry forms, which must be completed and handed in by 25 October, can be collected from my office. Bring the whole family and let them enjoy themselves. Thank-you for your cooperation and hard work of which it is much appreciated, enjoy the fun day and learn more about yourself, your co-workers and put your leadership skills to the test. If there is any queries about the stock taking arrangements of the fun day, you are welcome to ask me at any time.

Joe Bloggs
Manager

REWORKING THE DRAFT

- **Orientation and critique**
  At a glance we can see that this document is a memo, and therefore internal to a specific organisation. In this case Joe Bloggs, the shop manager, writes to his staff about two things: a stock-taking exercise and a Fun Day. The fact that there are two topics is not reflected in the structure, as the body of the message consists of only one paragraph. We might have expected two sections with subheadings or, at the very least, two paragraphs.

  Different writing styles are needed for these very different events: one is hard work; the other a celebration. Perhaps the Fun Day is meant as a reward for the stock-taking, but this is unclear.

  It seems that, although staff can choose between working on the Saturday or Sunday, the stock-taking is compulsory. No justification for this is given.

- Despite the many language mistakes, we can understand the gist (essence) of the message. Since we are to revise the draft, and not just 'look it over for mistakes', this is not merely an exercise in error correction. Rather than correct errors one by one, we will use the given draft to write our own version of the message, and ensure that this is as error-free as possible.

- **Revision**
  We need to consider separate sections for the two events; perhaps even separate memos. In addition, we might have to add a few details that staff would probably ask about, such as payment for the overtime work. Whether this is justified depends on their conditions of service, as specified in their contracts. What will happen if an employee does not turn up for work on the weekend at all? Perhaps this needs clarification, one way or the other.

- **Editing**
  We should adopt a serious and sympathetic tone when we appeal to the loyalty and commitment of staff to work overtime. In the case of the Fun Day, we will write in a way that creates enthusiasm. To some extent this has been done in the draft, but the transitions from one to the other are problematic. We will have fewer difficulties with writing style when we separate the two events.

  Many of the sentences are badly constructed and difficult to read. Often we can't solve the problem by correcting one or two minor errors. Instead, we need to reformulate the sentence, and this can be challenging. Here are a few examples:

Draft
Thank-you for your cooperation and hard work of which it is much appreciated, enjoy the fun day and learn more about yourself, your co-workers and put your leadership skills to the test.
Edited
Thank you for your cooperation and hard work throughout the year. Learn more about yourself and your co-workers, and put your leadership skills to the test. Enjoy the day!

Draft
A light lunch will be served and tea and coffee will be there.
Edited
A light lunch will be served, with tea and coffee.
or
A light lunch will be served. Tea and coffee will be available.

Draft
…on Saturday the 17th of October and Sunday the 18th of October from 08h00 to 6:00pm.

Edited
…on the weekend of 17-18 October, from 08:00-18:00 each day.

- **Proofreading**
  We often make 'proofreading' corrections while we edit, so the two skills are not always separate. Sometimes, however, a minor correction is all that is needed. Here is an example:

Draft
Mthatha recreation club

Proofreading correction
Mthatha Recreation Club
(Since all three words are part of the name, each starts with a capital letter.)

Now let's see what the finished product might look like. Notice that the weak introduction "As you all know that …" has been changed, since it is possible that someone who does not 'know' the background will read the memo. Notice too that in business writing it is occasionally acceptable to write single-sentence paragraphs, where these sentences are sufficient to cover a distinct aspect of the message.

As you read through the two memos below you might want to identify some of the changes we have made as either revision, editing or proofreading.

MTHATHA SUPERETTE

MEMORANDUM

TO: All members of staff REF.: S/12

FROM: *J Bloggs*
Manager

DATE: 2 October 2012

ANNUAL STOCKTAKING: 17–18 OCTOBER 2012

As discussed at the staff meeting held on 23 September 2012, all members are invited to participate in the annual stocktaking exercise on the weekend of 17–18 October 2012.

To complete this task with as little disruption to normal business as possible, staff members may work on either Saturday, 17 October or Sunday, 18 October, from 08:00 to 18:00. In keeping with company policy and legislation, relevant overtime rates will apply.

If you would like to participate, please indicate on the list in my office whether you will work on the Saturday or Sunday. Please do this before 15 October.

A light lunch will be served, with tea and coffee.

Thank you for your cooperation and hard work.

Joe Bloggs
Manager

MTHATHA SUPERETTE

MEMORANDUM

TO: All members of staff REF.: S/12

FROM: *J Bloggs*
Manager

DATE: 2 October 2012

ARRANGEMENTS FOR THE FUN DAY – 16 NOVEMBER 2012

Remember the Fun Day at the Mthatha Recreation Club on Saturday, 16 November, from 08:00 to 17:00.

The aim of the day is for us to celebrate our achievements and get to know each other better. The activities will include races, obstacle courses, etc. We need to enter four teams, each with a team leader and five members. Names of teams will be drawn from a hat, after which each team will elect its leader. Entry forms, which must be completed and handed in by 25 October, can be collected from my office.

It promises to be an entertaining and fun-filled day, with plenty of physical challenge and mental stimulation. Learn more about yourself and your co-workers, and put your leadership skills to the test. Bring the whole family and enjoy the day.

If there are any queries about the arrangements for the Fun Day, you are welcome to contact me at any time.

I look forward to seeing you there.

Joe Bloggs
Manager

Remember that when you revise a text you may change, add, leave out and rearrange information. You may express an idea in a completely different way, rather than merely correct isolated mistakes. As you can see, writing remains a work in progress and can almost always be improved in some way.

4. FORMS OF CORRESPONDENCE

It is important to note that choosing the form in which to correspond (memo, letter or email) has more to do with how you intend to deliver the message than with what you are writing and the style you adopt. There are, however, some variations in the conventions (traditions) associated with these.

Each of these forms of correspondence leads the reader to expect certain kinds of information, and slight differences in the way it is presented. This is because recognisable conventions have developed over time. The letter has the longest history, with firmly established conventions such as the use of "Dear Sir/Madam", and "Yours faithfully/sincerely" which are still in use. They are frequently a little more formal than the more recent memo and email, where contemporary endings such as "Regards" or "Thank you" are preferred.

Letters are normally delivered by a postal service, which is why they include postal addresses. Memos are usually internal to an organisation, delivered by an internal despatch or messenger service, and so require only the names, positions and departments of the correspondents. A courier service is sometimes used to convey memos to branches of an organisation in different locations. Email is very similar to the memo, but is delivered online to a computer network or internet address. Email is recent, its conventions or 'etiquette' (manners) still evolving, but note that when you use it for workplace correspondence, you should still write in paragraphs and keep to standard English usage. Constructing a good email message takes as much skill as any other form of correspondence.

These forms of correspondence all involve an exchange of messages between people, and have much in common. They can all be used as 'stand-alone' documents to convey various types of message, with a brief subject line (heading) that indicates what the message is about. However, correspondence formats can also be used to present short reports or proposals, simply by indicating the type of text in the subject line (heading), e.g. REPORT ON … Note that letters of complaint, application letters, sales letters, etc. are not different types of document, but merely correspondence for recognisable purposes. Although there are some conventions relating to how they are usually written, these conventions are not rules or recipes that you are required to memorise and adhere to. Write in the way that best suits your specific context and purpose. Accordingly, when you write to complain, your heading should indicate what the problem is and not state that this is a 'Letter of Complaint'.

Memos, letters and emails may be written as very short 'covering notes' or introductions to various enclosed or attached written documents. The facsimile (Fax) is used only in this way, sometimes with a cover sheet to introduce the document that is transmitted via the telephone grid. The text message (SMS) transmitted via mobile phone is normally used for short messages, and has developed its own 'language' and set of conventions. Like the language of casual conversation, this has its place and purpose, but need not concern us here. Phones with Internet access have more or less the same functionality as computers and can access, produce and transmit texts of all shapes and sizes.

Note the following for correspondence purposes:

Professional correspondence should indicate:

- Contact details

- (Businesses use pro forma letterheads or memo templates, whereas private individuals usually have to add contact details to their business letters.)

- Title, initials and surname of the writer so that the receiver knows how to address you in reply
- Title and surname of the recipient
- Date, with the month written as a word, e.g. 10 October 2014
- Reference details (where a filing system is used)
- Opening salutation (greeting)
- Subject line (heading) to indicate what it is about
- The body – message content, usually a number of paragraphs
- Closing salutation (ending)

Use the same formulation of dates (12 January 2012, for example) and times (09:00 – 21:00, for example) throughout. Note that Universal Time (the 24 hour clock) does not require a.m. or p.m.

In South Africa we usually use British English spelling, but American English is also acceptable. Be consistent in using only one of these throughout your text.

In letters, "Dear Sir/Madam" should be followed by "Yours faithfully". We tend to be more formal when communicating with an unknown recipient.

"Dear Mrs Ntuli" should be followed by "Yours sincerely". Use of the recipient's name makes the ending a little less formal.

Avoid using expressions like *'Yours in solidarity'*, or servile (begging) or meaningless conclusions such as *'I hope my application will be considered'*. Avoid using words like "Hoping…" and "highly…" (It will be highly appreciated if …). Also, do not "Hope for an immediate response", as this implies that the receiver should stop whatever they are busy with to attend to you. Avoid "Thanking you in advance", as you should rather make the effort to express thanks when the good deed has been done. You may use the more natural "Thank you," or consider whether you really need any of these concluding remarks at all. Avoid the 'official' opening statement: "The above matter refers," as this adds nothing at all to what you have already indicated in your subject line.

Letterheads

Today most businesses use letterheads on which the logo of the business as well as the address and all other contact details are presented. A letterhead might look something like this, but each organisation has its own design:

UNISA university of south africa

University of South Africa
Preller Street, Muckleneuk Ridge, City of Tshwane
PO Box 392 UNISA 0003 South Africa
Telephone: +27 12 429 3111 Facsimile: +27429 12 429 4150
www.unisa.ac.za

When you write in your individual capacity and cannot use an organisation's letterhead, you will place the postal address in the top right corner as usual, and any additional information in the top left corner:

Enquiries: Ms J Smithson	138 Eland Street
Tel.: 015 432 8795	Louis Trichardt
Fax.: 013 543 2278	0920
Email: Smithson@nowhere.ch.za	
	12 June 2013

The Manager….

Please note that in an assignment or exam you will not be required to draw a logo (symbol) for use in a letterhead.

Review the letter below, with the comments on format. Notice that the writer's tone is intended to encourage a response to the enquiry.

138 Eland Street
Louis Trichardt
0920
12 June 2007

Comment (u1): Your address can be in this block format when you write as an individual, or you can use a letterhead when you represent an organisation.

The Manager
Lost Property
O R Tambo International Airport
PO Box 357
JOHANNESBURG
1249

Comment (u2): The last place name in an address is usually capitalised.

Dear Sir/Madam

Comment (u3): Most writers prefer using a name in the salutation, followed at the end by "Yours sincerely". If you don't have a name, use "Dear Sir/ Madam". You will then end with the equally formal and impersonal "Yours faithfully".

ENQUIRY ABOUT A LOST COAT: FLIGHT SA 306

Comment (u4): The subject line is a very important part of your letter. Structure it in such a way that the reader gets the gist of the letter from the onset. Usually this is in bold caps, not underlined.

Comment (u5): Will the reader have to ask Why? What? Where? When? Who? How? If you are able to answer all, then your letter is complete. You will notice that no unnecessary information is included here.

I am writing to ask about my leather coat, which I left on the plane yesterday, 11 June. I flew from OR Tambo International Airport to the Port Elizabeth Airport on flight SA 306. My seat number was 12D in the Economy Class.

I put my coat into the overhead storage compartment during the flight. When I got home, I realised that I had forgotten to remove it from the storage compartment when I disembarked in Port Elizabeth. The coat is a light brown ladies leather coat. In one of the pockets there should be a navy and red scarf.

Comment (u6):The tone of your letter should be polite from the beginning to the end.

I would be very grateful if you could let me know whether it has been handed in to you.

Yours faithfully

Comment (u7): It is very important to include your title, so that the reader can use it in a reply. If there is no title, we assume it is 'Mr'.

L Mashiane

Mrs L Mashiane

5. WRITING FOR A PURPOSE

Every business message has a specific purpose. We write, for example, to inform, apologise, complain, enquire, market a product or publicise a service. The purpose and context of a message will decide the content and style in which it is written. The following advise on conventional approaches to these writing tasks, but remember that you might need to adapt what is suggested here in specific situations.

5.1 Writing to apologise

Correspondence containing an apology is written when an error must be corrected. Explain the facts clearly and briefly. The style should be formal and the tone should be polite and conciliatory. A correction may serve as an apology: it is not necessary to apologise profusely, since the reader is more interested in having the matter put right than in the fact that you are sorry.

5.2 Writing to complain

Complaints are often written when people are angry. An important skill to learn is to write in such a way that your reader will help you rather than ignore your request for assistance. Complain, but do not *say* you are complaining, as this may create resistance. As far as possible, let the facts speak for themselves.

You should avoid using **Letter of Complaint** as the heading or subject line as this only shows the type of purpose and will not encourage a positive response. Rather use the heading to indicate what your complaint is about, e.g.

Error in Municipal Account No. 7381456441

5.3 Writing to enquire

In business we often need to enquire about something: new product ranges, types and costs of services, and so on. You need to be polite but assertive, and should write as though you expect a response. In the example that follows, note that the heading informs, and that the first paragraph establishes the situation surrounding the enquiry.

> Dear Sir / Madam
>
> **New Business English Course**
>
> According to an advertisement placed in the Sunday Scandal of 4 July 2012, your training company is presenting a new course on business etiquette. I represent a new company called *IT Realities* that employs 25 people, 5 of whom are front office workers in need of training.

You can then go on to ask about details – which often include time frames, level of involvement, costs, and so on. Conclude the letter in a way that shows you expect a positive response. Do not write as if the recipient is going to be doing you a favour – remember that your enquiry is probably going to mean business for the recipient. On the other hand, avoid aggressive demands and don't be too 'pushy'. A concluding remark such as "I look forward to your immediate response" suggests that you expect the reader to drop what they are doing and jump to your aid. The word "urgent" will be less offensive than "immediate", but consider giving the reason for your need to have the response by a certain date instead. Try to strike the right balance.

5.4 Writing to market a product and publicise an event

When you need to market a product or business, or to publicise an event or service provided by an organisation, you need to be creative. If you read advertising messages carefully you will see that they try to persuade the reader that the sender can supply something that the receiver wants or needs. The whole idea is to make the reader want to buy the marketed product.

Marketing texts often adopt a conventional structure:

A Attention: attract the reader's attention – use questions and persuasive words.
I Interest: persuasion is done by reasoning about facts in an interesting way.
D Desire: persuasion is done by creating a positive emotional response.
A Action: the reader is prompted to buy the product or service.

The language in these texts is usually informal; superlatives are used as well as popular colloquial (informal; conversational) expressions. The language is meant to create 'hype' or enthusiasm without being too familiar or making the persuasion strategy too obvious.

However, not all marketing is designed to manipulate the receiver. Good marketing often presents useful information and appeals to good judgement. You probably receive a fair number of marketing texts – subject them to careful critique to avoid falling victim to clever persuasion.

5.6 Messages of goodwill and information briefs

Messages of goodwill are designed to establish and maintain good working relationships. Replying to these is not always expected and is often a matter of courtesy. An example is a message congratulating someone on obtaining a qualification. The recipient might choose to respond by thanking them for the kind thought, but this is not essential.

Goodwill, like advertising messages, usually have a friendlier, less formal tone than most other types of correspondence. In some cases they deceptively offer free gifts as a marketing strategy, with little chance of real benefit to the receiver: these are unsolicited (unasked for and unwanted) "spam".

Information briefs are messages containing information that needs to be communicated in relation to a project or new development, for example, and do not require a reply. The tone is generally neutral and courteous, and the content factual.

6. ACTIVITIES WITH FEEDBACK

Remember that you will benefit most if you produce your own response before reading the examples and comments that we provide by way of feedback. Although our suggestions will differ from your own responses, and do not necessarily imply that your answers are flawed, you can learn a great deal by thinking critically about the differences.

Activity 1.1

A *curriculum vitae* or CV (résumé) can be a silent but powerful 'spokesperson' in the advancement of your career.

Many people make the mistake of not adapting their CVs to a particular post – and send the same version in response to many different advertisements. Because you may be competing against many others for a particular post, you should pay careful attention to the way you design your CV.

The *covering letter* for your CV is an important document. Plan your writing well because what you convey will influence the employer's decision on whether or not to invite you for an interview. Although you can summarise key information, the covering letter should not be a duplicate of your CV.

Study the CV below before writing a covering letter in accordance with the instructions that follow it.

CURRICULUM VITAE
Rhuu Shasha

Comment (u8): Have this section in a larger font size than the rest of the document.

1. PERSONAL DETAILS

SURNAME: Shasha
FISRST NAME: Rhuu

I D NUMBER:	850604 0000001
POSTAL ADDRESS:	703 Scotter's Park Cnr Van Der Merwe & Edith Cavell Hillbrow JOHANNESBURG 2001
Contact Number:	084 393 0000
Nationality:	South African Citizen
Home Language:	Venda
Other Languages:	English, Zulu, Xhosa (Speak, Read and Write)
Health:	Excellent
Criminal Offences:	None
Drives Licence:	None

2. PRE-TERTIARY EDUCATION

Name of School:	Litshovhu Secondary School
Year Obtained:	2002
Highest Standard Passed:	Grade 12
Subjects:	English Venda Accounting Economics Business Economics

3. TERTIARY QUALIFICATIONS

Name of Institution:	Vaal University of Technology (VUT)
Year Obtained:	2007
Programme:	National Diploma in Human Resources Management
Subject:	Accounting For Personnel Practitioners English (Communication) End User Computing Industrial Relations Labour Law Management of Training Business Management Personnel Management

Comment (u9): Provide as much detail of work experience as possible. At the very least, identify the organisation or employer.

4. EMPLOYMENT HISTORY

Secretarial assistant (part time) 2004 – 2007
Junior Human Resource officer
Department of Home Affairs 2008 – present

Comment (u10): Ask yourself whether this section is of any interest or value to the prospective employer. If it is not, leave it out.

5. EXTRAMURAL ACTIVITIES

Reading, Watching Television

Comment (u11): Ask yourself whether this section is of any interest or value to the prospective employer. If it is not, leave it out.

6. PERSONAL PROFILE

Strengths:	Willing to succeed even if it means extra effort; Possess leadership qualities and can work well with other people; Disciplined, assertive and not easily intimidated;

Comment (u13): These are essential professional skills that could appear under a separate heading , with supporting detail or attached certificates.

Ability to communicate well;
Possess good problem solving skills.

Comment (u12): If you write such short sentences, make sure you start each one on a new line

Computer Literate: Ms Word, Excel & PowerPoint

Comment (u14): It is preferable to have at least three referees who are not from the same institution.

7. REFERENCES

1. Mr T Murwa
   Principal of Litshovhu Secondary School
   015 500 005

2. Dr L J Mabu
   Head Academic: Management & Human Science
   (VUT) Ekurhuleni Campus
   S011 900 0000

Covering letter

You have a Human Resource qualification which you obtained about five years ago, and have worked in a Human Resource environment for some time now. Respond to the job advertisement below, from the information technology company, Rala IT.

HUMAN RESOURCE MANAGER

Total Salary Package: R350 000 – R450 000.

An opportunity exists for a professional that has financial/consulting experience to handle the full Human Resources function to various departments. You will need to apply your Human Resource experience and take full responsibility for the overall Human Resource function.

Your responsibility would be to lead the HR department personnel, namely the Skills Development Facilitator, the Recruitment Officer and the Training and Retention and Remuneration Officers.

Skills required are
- High positive energy level
- Team leader
- Highly motivated person
- Good interpersonal skills

You will also be involved with
- Employment Equity
- Remuneration
- Performance evaluation and KPI setting
- Internal system requirements
- Employment and contracting
- Staff contracts and agreements
- Operational policies

Requirements
- Experience in Human Resources & Recruitment

Ability to...

- advise on strategic human resource development matters.
- identify ethical issues facing the organisation and dealing with stakeholders.
- use influence and persuasion to further HR goals within the organisation and community in which it operates.
- assess current economic and market changes, and their impact on the organisation.

Experience in...

- advising senior management on the possible effects of government's policies and legislation on the organisation and its activities.
- designing programmes aimed at resolving problems of poor performance, collective or individual.
- initiating new types of employment and work patterns, and the mechanisms for organising and implementing such innovations.
- monitoring and controlling of HR budgets.
- preparing and presenting a proposal/argument in a variety of situations to all organisational stakeholders.
- prioritising, planning and delegating work to a team of subordinates.

Knowledge of...

- all relevant labour legislation.
- career development principles.
- current trends and best practises in Human resources practices.
- developing job descriptions and duty statements.
- human resources industry trends.
- industrial relations.
- maintaining personal records of employees regarding wages, leave, training, etc.

Feedback – Activity 1.1

The letter should be short and accurate in detail, but should not be a duplicate of your CV. Present a summary of essential information, and express your interest in the position.

If a reference number for the position you are applying for is available, include it in your subject line.

Ensure that your contact details are complete and easily accessible, i.e. not hidden in the middle of a sentence or paragraph.

The body of the letter could have a structure such as the following:

- First paragraph: State the position you are applying for, and reference details of the advertisement.

- Second paragraph: Give reasons why the position appeals to you based on the job's challenges and your ambitions.

- Third paragraph: Argue why you qualify for the job based on your academic qualifications, experience and general disposition.
- Final paragraph: Assure the prospective employer of your availability. Be careful to avoid lifeless clichés (over-used expressions) in the way you end your letter. Keep your communication real, meaningful and natural.

Activity 1.2

Study the following memorandum before writing your reply in accordance with the instructions that follow this example.

Some organisations have pre-printed memorandum pads or templates on computer which include the organisational or departmental logo (symbol). A layout designed for use in a particular organisation is referred to as its 'house style'. Some organisations are flexible, and leave the layout to the individual. The following is an example of a typical memorandum:

MEMORANDUM

TO: Stan Bloggs
Regional Director: Gauteng

Comment (u15): Name or initials and surname followed by position

FROM: Joanna Soape
Administrative Officer

Comment (u16): Name or initials and surname followed by position

Welkom Branch
DATE: 1 April 1999

SECURITY OF WELKOM OFFICE

Comment (u17): Use a short subject line that gives an indication of content

This is to remind you that the security problem at our Welkom office has still not been addressed. Staff members feel insecure, as anyone can walk in off the street. If we were to have an incident there we could have serious trouble.

We need an automated security door with a camera system so that visitors can be buzzed in by the secretary without her getting up from her desk.

I would appreciate it if you could deal with this urgently.

Ms J Soape
pp Head: Security

Note:

If you are writing a memorandum that deals with a matter of great importance that may require future reference, the following information is added:

My ref: this is the reference number of the file in which you will store your copy of the document.

Your ref: This is the reader's reference number. This refers to the file in which the receiver will store his/her copy of the document. Since the receiver will fill this reference number in, you should simply leave a space for it.

Note that the title **Ms** is often used in the workplace, where it is no one's business whether a woman is married or single.

The letters "**pp**" stand for *per procurationem*, meaning 'on behalf of'.

Now reply to the memo above. Tell Ms Soape that her request cannot be met. Invent reasons of your own.

Feedback – Activity 1.2

Apart from switching the names of sender and receiver, and changing the date to suit the reply, the format stays the same. Compare the body of your message with the following:

> I understand the urgency of your request. Unfortunately a decision has been taken by the Gauteng Management Committee to spend no more money on the Welkom office until business improves there. I suggest that the outside door be kept locked and that it is only opened after someone has checked to see that a *bona fide* customer is outside.
>
> This may be a nuisance at times, especially when you are busy, but it is the best we can do for the moment. I assure you that the situation will be reviewed next year.

Activity 1.3

Imagine that you hold the position of **Director: Purchasing Department** in a particular organisation. You have been having problems with a certain supplier of office equipment.

Three weeks ago you authorised the purchase of four new fax machines, but these have not yet been delivered. There have also been technical problems with the same make of machine previously purchased from this supplier. Even though you have telephoned them numerous times to enquire, the problem has still not been solved.

Imagine that the letter below is your first draft in which you inform the manager of this supplier that you have stopped payment for the new machines because they have not kept to the promised date of delivery. Also, tell him/her that you are returning the machines purchased earlier and expect them to be replaced or repaired in terms of the guarantee.

Revise, edit and proofread this draft of your letter to improve clarity.

NB Struben: Director:
Purchasing Department
Transnamib
Independence Ave
Walvis Bay
10/04/03

J van Wyk: Sales Manager
Nashua Namibia
Arlington road
Windhoek
Dear Sir:

Complaine about goods ordered.

After various telephone inquiries to your company about four new Samsung fax machines which I, three weeks ago, authorised to purchase, but was up to now not delivered. I also experienced technical problems with this same make.

Therefor I have no alternative but, to cancel the orders for the new machines and that I'm returning the machines purchased earlier for replacement or repair it in terms of the guarrantee.

Yours sincerely
N B STRUBEN
DIRECTOR: PURCHASING DEPARTMENT

Feedback – Activity 1.3

Despite the fact that we understood the general message, there were too many distracting language mistakes, and sentences that are confusing because they contain more than one main idea. This results in strenuous reading and a lack of clarity.

The following is one way of revising the draft. Note corrections to layout, including the rule that we do not punctuate headings with full stops, and the convention by which the *last* place name listed in an address is capitalised.

TRANSNAMIB
128 Independence Avenue
WALVIS BAY
2047

10 April 2012

J van Wyk
Sales Manager
Nashua Namibia
Arlington Road
WINDHOEK
2608

Dear Mr Van Wyk

SERVICE/REPAIR AND DELIVERY OF FAX MACHINES

Until recently our company has been satisfied with the service provided by Nashua Namibia, but delivery and service problems have arisen.

Our first concern is the delay in delivery of fax machines ordered in January.

On 11 February 2012 we ordered four new Samsung Sputnik XE fax machines that were to be delivered within 7 working days. We received Invoice No. ZE64532 on 14 February. On 20 February, Ms Maminza, Client Services, assured me that the matter would receive urgent attention. We have had no response to our telephonic enquiries.

Our second problem concerns poor service. On 28 February and 12 March your technicians repaired two of the Samsung machines purchased in December 2004, but the technical problems recurred within days of the repairs.

Copies of the invoice for the four new machines and the receipt for the two machines purchased in December 2012 are enclosed.

Our business cannot function efficiently under such circumstances. We would like to have all the machines fully functional by 20 April. If not, I will have no alternative but to cancel the order for the new machines. I will also have to return the two machines purchased earlier for replacement or repair in terms of the guarantee.

Yours sincerely

NB STRUBEN
NB Struben
Director: Purchasing Department

Notice that this version is slightly longer but clearer, and that it suggests a practicable solution to the problem.

Note the structure of main ideas:

Paragraph 1	Indicates the writer's purpose.
Paragraphs 2–3	Detail the background.
Paragraph 4	Provides administrative information that will be needed to confirm the facts and investigate.
Paragraph 5	Suggests solutions and states the reason why the matter cannot be ignored.

The style of the letter is formal and the tone is polite, but firm. The message ends with a warning of possible consequences, but stops short of a hostile threat. We should emphasise that impolite expression, negativity, and unreasonable demands are not acceptable in business writing.

Activity 1.4

Imagine that you work as Assistant Manager of The Wildcliff hotel. You have received the following email:

> TO: The Manager, The Wildcliff
>
> FROM: albert@usenett.co.za
>
> Accommodation enquiry
>
> I enquire in response to your advertisement in The Coastal News of 21 September for weekend stays priced at R350-00.
>
> I am interested in hosting a 25th wedding anniversary celebration, and would like out-of-town guests to stay at The Wildcliff, at my expense.
>
> Do you have reduced rates for large parties? If people miss some of the hotel meals, do they still have to pay for them?
>
> Please give me any information that I would find useful, like do you have a courtesy bus to pick people up from the airport and bus station?
>
> Thank you.
>
> Albert Merchant

Respond to this enquiry. Write only your email message – the computer screen layout (email addresses) is not required.

Your strategy should be to market your hospitality services. You should write in a welcoming and persuasive style, while providing accurate and concise information in answer to each question. You may add information that you think might be of interest to the client, even if not specifically asked for – provided that you do so briefly. You could also attach a brochure and route map, but need not actually do so here.

Feedback – Activity 1.4

Dear Mr Merchant

We are delighted to receive your enquiry. May we congratulate you on your anniversary! It our pleasure to inform you that

- a 10% reduction in tariff applies to parties of ten or more people;
- only meals that are served are paid for;
- an air-conditioned courtesy bus operates between the airport and the Hotel between 06h00 and 20h00.

Our large banqueting hall is available for occasions such as weddings and anniversaries and our catering arrangements are most appealing, as you will see in the brochure attached. Our guests have direct access to the beach, and a range of indoor and outdoor activities ensures an enjoyable stay.

For more information, contact Adele Smith in our Public Relations office (wildcliff@iafrica.com). We hope to hear from you shortly.

Kind regards

Rob Plaatjies
Assistant Manager

As with all correspondence, emails should be well-planned and written so that the meaning is clear. Notice that official-sounding sentences such as “Your advertisement of 21 September refers” have been carefully avoided as inappropriate style in this context.

Activity 1.5

Imagine that you recently moved to a housing estate, where you built a new home. You want to apologise for not keeping strictly to the house plans, which were approved by both the estate management and the municipal authorities.

The following is a first draft of the letter you are writing. Read it carefully. Then rewrite the subject line (heading), message and ending, making whatever improvements you consider necessary. You need not complete the format by adding addresses, etc.

You may change, add or leave out information. In addition to correcting mistakes in language, you should improve the paragraphing and writing style. You will, therefore, use your own words where necessary.

> Dear Sir/Madam
>
> **LETTER OF APOLOGY FOR THE ACORNVALE HOUSING ESTATE BOARD AND THE HOME OWNERS ASSOCIATION MEMBERS**
>
> During 2004 we did an application for our building plans for our house at the Acornvale housing estate offices for aesthetic approval. As we all know that this is a housing estate with its own rules about how the buildings should look like. We did receive your consent on the plans and we forward the stamped plans to the municipality here at Burgersdorp. It was during 2005 when we received the approval from the Burgersdorp municipality and started to do the building. During this time we told the builders to make some few changes to the front part such that the house could have a more Spanish style. We did not on that particular point and time thought it would be a problem due to the reason that the other buildings blended in with the new changes. Then the board detected the changes and contact us and gave us a fine. This letter is actually to indicate hereby to the home owners association that we did not intentionally changed the approved plans to inconvenient any person or body. We therefore sincerely apologies for not adhering to the governance and rules of HOA. We also thank the Board for supporting us in making a agreement between ourselves and other HOA residents who complained about that issue of the changes we made. We already paid for the proposed penalty fee and is in the process to make the other recommendations that you said we can do to solve that issue.
>
> Respectfully yours,
>
> JJ Peters
> Stand No. 332

Feedback – Activity 1.5

The order in which the problem is addressed in the draft above enables the reader to form a reasonable idea of what happened and what the writer wishes to do. To improve readability and clarity, you needed to revise, edit and proofread the draft.

Here is one way of rewriting the letter. Notice the changes made to language, sentence structure, style and paragraphing. Note also that a few details have been added to ensure that the information provided is accurate and complete.

Dear Sir/Madam

DEVIATION FROM APPROVED BUILDING PLANS – STAND No. 487

During 2004 we submitted our building plans to the Acornvale housing estate offices for aesthetic approval. As the appearance of the planned building fitted in with the architectural style and rules governing materials to be used, this approval was granted, and we forwarded the stamped plans to the Burgersdorp municipality.

In September 2005 we received approval of the plans from the municipality and were able to start construction. At this time we adjusted some features so that the building would have a more Spanish façade. We did not anticipate any problems, as the changes blend in with the surrounding buildings. However, the housing estate Board received complaints from members of the Home Owners Association and contacted us. A penalty of R 4 500 was imposed for our not adhering to the rules of the estate.

We sincerely apologise for not adhering to the rules of the Association and the governance of the estate. We also thank the Board for supporting us in reaching an agreement with the HOA membership regarding what should be done to put matters right. It would have been extremely costly to reconstruct the façade entirely, but in terms of this agreement a number of affordable changes will be made.

We have already paid the required penalty, and are in the process of applying for approval of the adjusted plans as recommended by the Board.

Yours faithfully

JJ Peters
Stand No. 332

7. CONCLUSION

In this unit we have dealt with a variety of transactional texts.

It is important to understand that, with minor adjustments, the principles of one kind of transactional text can be applied to another. The style and tone of a complaint will remain the same in all forms of correspondence, whether it is written as a letter, memo or email.

Over time, changes in format and writing style will occur as technologies influence our communications. We will have to be flexible and adjust to the times we live in, while striving to improve the quality of our transactional writing.

We recommend that, from time to time, you revisit the criteria associated with good business writing, and practise the skills that will enable you to achieve more in your professional writing.

Study Unit 2

Meetings

Notice, Agenda and Minutes

1. INTRODUCTION

This unit will give a general knowledge of the purpose of meetings, meeting procedures and the relevant documents used for meetings: notices, agendas and minutes. You will continue to develop the writing and language skills you worked on in the previous unit.

Meetings are a management tool used to consult, plan and organise, and to delegate tasks so that the business of an organisation runs well. Meetings follow conventional decision-making procedures and provide formal documents for easy reference and accurate record-keeping. However, whether time is well spent in meetings depends largely on how they are conducted and the quality of the documentation produced.

1.1 Format and Style

The nature and style of meetings may differ, depending on the circumstances. Meetings and documentation in the financial sector are likely to be more formal than those in the creative entertainment industry. The way in which meetings are conducted and documented will be formal at senior management level, and less so at lower levels of the organisational structure. When many people attend a meeting, rules are followed more strictly to control the proceedings, while small groups tend to be more manageable and may therefore require less formal proceedings. The frequency of meetings can also influence the style. Weekly office meetings tend to be less formal than annual general meetings.

When you chair or document a meeting, you need to consider all these factors – there is no single recipe for getting it right.

Activity 2.1

Think about the meetings you have attended, and categorise the following types of meetings according to their probable level of formality:

- Weekly office meeting

- Monthly meeting of your local soccer club
- Meeting of the Chief of Police and Chiefs of Staff to discuss the Special Unit's new project to fight drug trafficking in Gauteng.

Use the following table to categorise the meetings:

Example of meeting	Level of formality
•	Very formal
•	Moderately formal
•	Informal

Feedback – Activity 2.1

Example of meeting	Level of formality
Meeting of the Chief of Police and Chiefs of Staff to discuss the new project to fight drug trafficking in Gauteng	***Very formal*** The meeting is attended by senior personnel and the topic is of national importance, which requires a high level of formality.
Monthly meeting of your local soccer club	***Moderately formal*** Members would probably be known to each other and the atmosphere would be friendly, but moderately formal.
Weekly office meeting	***Informal*** Members are familiar with each other and their business needs, which results in short and informal meetings.

1.2 Purpose of meetings

- **Information**
  Information is shared at meetings for various purposes.

- **Problem-solving**
  Here, discussion is expected to reveal solutions to problems encountered or foreseen. For example, it could focus on developing a business strategy to improve sales, or on the purchase of new uniforms for staff.

- **Decision-making**
  Often more than one choice is possible, and attendees decide which solutions would be most suitable. Where a meeting does not have the authority

to take final decisions, it may agree on recommendations that can be conveyed to relevant line managers.

- **Delegating tasks**
  Tasks are delegated to attendees based on the solutions decided upon. The persons responsible are identified and recorded in the minutes. Where necessary, sub-committees or project teams are formed.

- **Time management**
  Each task is given a time frame for completion.

- **Teamwork**
  Because meetings encourage participative management, employees are empowered and the business gains the insight, creative input and information of a greater portion of its employees.

1.3 Purpose of procedures

Rules and conventions that regulate behaviour create quality services and products. The purpose of set guidelines for meetings is to ensure order, appropriate behaviour and to avoid confusion so that goals can be achieved with minimal effort and time.

One procedure, for example, is that a quorum (the minimum number of members as specified in the constitution of the meeting) must be present for any decision to be valid.

1.4 Purpose of documentation

The notice of a meeting informs all who should attend the meeting of the venue, date and time. The agenda gives information on what will be discussed. The main purpose of the minutes is to record decisions made as to **who** has been delegated **what** task that must be completed by **when.** They also record who attended the meeting, who chaired it, and the main points made during the discussions. The minutes are often referred to by those who need to do the work, or by managers who need to ensure that it is done.

Various activities need to done *before*, *during* and *after* each meeting by the chairperson, the secretary and members. Some duties might be performed by different office bearers in meetings. What secretaries do, for example, depends on what the chairperson requires of them. Usually it is the chairperson who draws up an agenda and decides when the meeting should be held, but the secretary arranges the venue and makes sure that everyone involved is given adequate notice of the meeting.

During the meeting the chairperson regulates the discussion that follows from issues tabled on the agenda, and makes sure that all matters are dealt with adequately in the time available. The chair ensures that everyone present has the opportunity to contribute, though some may choose not to do this.

During the meeting the secretary takes notes that will be used to create the minutes as soon as possible after the meeting. The secretary files, records and distributes all documents, and distributes the minutes once the chairperson has approved them. However, the chair signs the minutes only after the next meeting has accepted them.

The chairperson should not dominate the discussions or exclude conflicting views, and should not allow anyone else to do the same.

1.5 Chairperson's role

The Chairperson manages proceedings and people and must ensure

- **control** of behaviour and time in a diplomatic way
- **full** discussion of all items on the agenda
- **impartiality** and reasonable management of the meetings
- **names of participants are made known** to members

1.6 Role of attendees

It is up to participants to follow procedures and behave considerately to ensure successful outcomes.

Members should speak clearly and loudly enough so that minute-taking is facilitated.

The previous meeting's minutes and additional documentation must be understood for fruitful decision-making. Usually no time is given to bringing members up-to-date on the content of previous minutes.

It is customary that a pro forma Attendance Register be ready to circulate for members to sign. Members are responsible for signing the register that the secretary provides. The chairperson conveys any apologies that have been received and accepted to the secretary. A pro forma register (with names already typed) saves time, ensures accurate information and correct spelling of names. Here is an example:

Name	Department	Telephone number	Email address

1.7 Secretary's role

In general, the secretary is responsible for all written documentation, in consultation with the chairperson.

- A recording may be made of the minutes but in case of technical failure, it is essential that the secretary write notes as well.

- Extra pens, batteries and other equipment must be handy.
- Should discussions become unclear the secretary can get clarification from the person concerned after the meeting.
- We will now address the three kinds of documents used for regulating, informing and recording meetings: notices, agendas and minutes. All documents *must* be sent to every person who attends the meeting or the process may be deemed irregular and cause conflict, especially in formal circumstances.

2. DOCUMENTATION RELATING TO MEETINGS

2.1 Notice of meeting

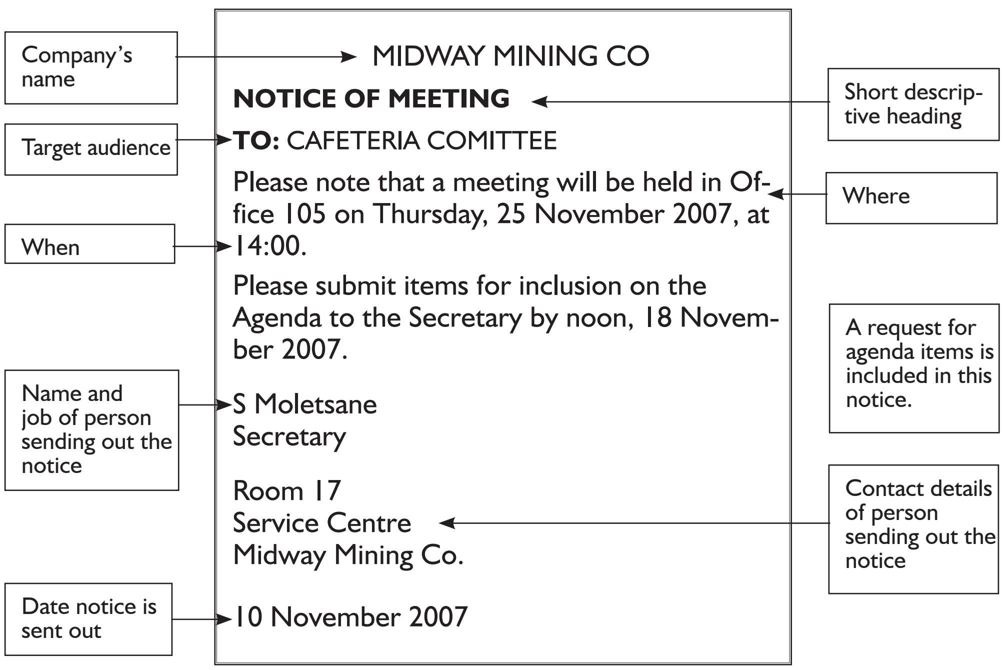
Meetings that are scheduled well in advance are likely to have better attendance than those scheduled at short notice. You will be guided by your organisation's usual practices. Sending out the notice is the responsibility of the secretary, acting on instructions of the chairperson.

Activity 2.2

Notices contain essential information about where and when a meeting will be held, and who should attend. Consider the differences in the examples of notices below, and

- list the similarities
- list the differences
- identify the most formal notice and give reasons
- identify the least formal notice and give reasons

Example A



Example B

UNISA
DEPARTMENT OF ENGLISH

NOTICE OF MEETING

TO: ALL LECTURERS OF ENN1504

A staff meeting for all lecturers involved in the subject Practising Workplace English 1504 will take place in Seminar Room 223, Theo van Wijk Building, on Monday 13 January 2009 at 08:00.

Prof Motsa
Head, Dept of English

motsa@unisa.ac.za

02 January 2009

Company's name

Short descriptive heading

Target audience

Note: agenda items have not been requested

Where

When

Name and job of person sending out the notice

Contact details of person sending out the notice

Date notice is sent out

Example C

KAGISO CHORAL SOCIETY

NOTICE OF ANNUAL GENERAL MEETING

Notice is hereby given that the Fifth Annual General Meeting of members of the Kagiso Choral Society will take place in the Southwalk Community Hall, Bona Street, Kagiso, on Saturday 15 September 2005, at 18:00.

A copy of the Agenda is attached.

Mr D D Madau
Secretary

Tel: 012 123 1234
E-mail: dmadau@kagiso.co.za

14 August 2003

Company's name

Short descriptive heading

Target audience is not mentioned

Where

When

Note: a copy of the agenda is attached.

Name and job of person sending out the notice

Contact details of person sending out the notice

Date notice is sent out

Feedback – Activity 2.2

All the notices show the company name, a subject heading that identifies the meeting, the venue, date and time, and the name and contact details of the person responsible for the notice.

Annual General Meeting (AGM) documentation will usually be written in the most formal language: 'Notice is hereby given…'. The agenda must be attached to the notice of an AGM. As a rule, AGM agenda items are fixed and no items may be added.

In contrast Example B shows language that is polite and informal. If it is a first meeting about a specific matter there may be no need for an agenda until matters are identified that need further discussion.

Activity 2.3

Here is an example of a badly written notice. Identify the flaws.

No Company name and no target audience

FINANCES DEPARTMENT

No descriptive heading

Notice is hereby given that we're meeting next week Tuesday in the boardroom. We can't meet on Wednesday, because that's when our fun day will be. We're going to discuss absenteeism, getting a coffee machine, and a few other issues. Let me know if there was anything else you wanted to discuss!

When is unclear

Agenda items are included but incomplete

Where?

Cheers, and enjoy your week!

By order

Susan

Name but no job of person sending out the notice

No contact details of sender and no date when notice was sent to members.

Inappropriate salutation.

By order is used in legal documents and not in business documents

---

Feedback – Activity 2.3

Recognise the improvements and **acceptable content** for a notice:

UNISA

FINANCE DEPARTMENT

TO: STAFF MEMBERS

FINANCE DEPARTMENT

A departmental meeting will be held on Tuesday, 14 August, at 14:00, in the Empangeni Boardroom. Please submit any items that you would like to add to the agenda before 10 August 2009.

Susan Ferguson

Secretary

Tel: (012) 123-1234

E-Mail: susan@unisa.ac.za

Office: Building 12, Office 11

Where invited

31 July 2009

Where possible, a draft agenda is sent out with the notice, and participants are invited to suggest additional items for the chairperson to consider.

2.2 Agenda

An agenda lists matters in the order to be discussed at a meeting. Members may be invited to submit items in a notice, before the agenda is finalised. Some organisations send draft agendas to members so that they may see what possible agenda items to add. The chairperson usually controls the agenda but would have to provide good reason for excluding an agenda point. As with all meeting documentation, an agenda must be sent in good time so that members can prepare to present their points of view.

The advantages of an agenda are that

- items of business are not overlooked
- confusion is avoided
- focus is maintained by excluding matters that do not require immediate attention
- information is given to members so that they can prepare for informed-discussion and decision making.

Agendas, like notices and minutes, are influenced by the conventions customary to the organisation. Your experience in this course will help you to improve your writing skills and your organisation's documentation.

For informal meetings, it may not be necessary to give many details as members are usually in close communication with each other and are well informed. In contrast, formal meetings generally require a detailed agenda: *Matters arising from the minutes of the previous meeting* and *New matters* sections will probably have several sub-headings.

Whatever the case, the purpose will always be to ensure that smooth proceedings support goal achievement.

Activity 2.4

Use point 5 in the agenda below to explain what **'Matters arising from the minutes of the previous meeting'** means in the context of this meeting.

ABC ENGINEERS BURSARY FUND MEETING
15 August 2011

AGENDA

1. Welcome
2. Present
3. Apologies
4. Minutes of the previous meeting
5. **Matters arising from the minutes of the previous meeting**
   5.1 Financial report
   5.2 Appointment of new treasurer
6. New matters
   6.1 Selection procedure changes for new bursary awards
   6.2 Awards ceremony for outstanding achievements
7. General
   7.1 Christmas party entertainment
8. Next meeting
9. Closure

Ms H du Toit
Secretary

015 555 4291

2 August 2007

Note that the subheadings are short, to the point and do not end with full stops.

Feedback – Activity 2.4

Matters arising means that discussion and tasks regarding finance and the appointment of a new treasurer were not finalised at the previous meeting, and will be discussed further in this meeting.

Read this agenda of a meeting of the Gauteng Tourism Board. Notice the two extra columns on the right.

Meeting of the Gauteng Tourism Board **AGENDA**	Responsible member	Information attached
VENUE Building 14, Room 1 **DATE** 1 June 2009 **TIME** 08:30		
1. Welcome		
2. Attendance		
3. Staff matters		
4. Finalisation of the agenda		
5. Approval of the minutes of the previous meeting (30 March 2009)		
6. Matters arising from the minutes of the previous meeting (30 March 2009)		
6.1 Feedback on advertisements on the N1 highway		
7. Standing items		
7.1 2010 World Cup preparations	Mr Zim	Annexure A
7.2 Utilisation of the Gautrain for organ ised tours		
8. Preparations for advertising Freedom Park	World Cup Task Team	Annexure B
9. Increased financial aid for the Hector Pieterson museum in Soweto		
10. General	Ms Arends	Annexure C
11. Date of next meeting	Mr Jones	Annexure D
12. Adjournment		

Note:

- **Annexures (or Addendums)** provide information needed by members to prepare for discussion before the meeting.

- **The Notice and Agenda** may be written as one document. The notice heading is shown first and the agenda will follow. Here is an example:

ESKOM

TO: Finance Staff

NOTICE OF MEETING

A meeting of Finance staff will be held in the Mkondeni boardroom on Friday, 19 July 2012 at 08:30.

AGENDA

1. Welcome
2. Present

3. Apologies
4. Minutes of the previous meeting
5. Matters arising from the previous meeting
6. New matters
    6.1 Low productivity
    6.2 Inefficiency in the department
7. General
8. Date of next meeting
9. Closure

AJ Asmal

Acting Secretary
2 July 2012

Some alternative headings

Adjournment means that *discussions* are expected to resume on a later date.	**Closure or Closing** means the end of a designated *meeting*. Both terms are correct and may be used.
Minutes of the previous meeting	**Confirmation of Minutes** – both refer to the job of approving the minutes of the previous meeting as correct and binding.
Present / Apologies may be recorded as separate subheadings, or together under 'Attendance'.	**Attendance** Present: Apologies: We usually do not record 'Absent without apology', as the culprits can be identified from the attendance list.
Staff matters – usually refers to matters of employment but may include company social matters.	Social matters can be recorded under **General**, but this section is usually for items that arose too late to include on the agenda. The chairperson should only allow additions that cannot be delayed until the next meeting.

- **Standing items** refers to matters addressed at every meeting, for example, regular reporting on sales figures at monthly marketing meetings.
- **Finalisation of the Agenda** refers to the acceptance of the agenda, including any matters added under 'General'.
- **New Matters**: sometimes each new matter is numbered and given its own heading rather than all items being put under "New Matters".

Annual General Meetings

We mention AGM conventions so that you may know the differences in the documentation at different levels in organisations.

An Annual General Meeting (AGM) is a very specific type of meeting for senior management or stockholders or members of big societies (for example, a medical aid society). An AGM meeting is held once a year to report on and discuss organisational needs such as: what must be done in terms of strategic planning and policy-making?

An AGM will not normally deal with routine matters and therefore agendas will look different from those that are commonly used. Examples of real AGM reports from **public companies** such as Coca Cola are usually available for scrutiny on the internet.

Items in an AGM agenda would be:

- Chairperson's report
- Financial report
- Election of office-bearers

2.3 Minutes of a meeting

The minutes of a meeting are an official record that can be used to manage information, accountability, tasks and time in an organisation.

When recording minutes, your goal is to use language successfully to provide an instrument for management to ensure the quality of the product or service provided. Minutes are also useful to those whose responsibility it is to implement the decisions taken.

Minutes are not a record of general discussions but a record that acts as a memory tool to manage

- the task to be performed
- the name of the person who must perform the task
- the date by which the task must be completed

- Procedure

Minutes are recorded at each meeting by the secretary who will summarise them for distribution to members within reasonable time, usually within three days of the meeting or as stipulated by the organisation's rules regarding meeting procedure.

Although the secretary usually drafts the minutes, it is the responsibility of every member who attended the meeting to ensure that the minutes are correct.

Following this, the minutes should be tabled at the next meeting for correction, adoption by members and signature by the chairperson.

Once every member has agreed that the minutes are a *true reflection of what transpired at the previous meeting*, they are accepted (adopted) as such, and may not be altered or amended in any manner whatsoever. Amended copies, duly signed by the chairperson, may then be delivered, posted or e-mailed to members as is the organisation's administrative practice.

- Language and layout

Now that we have gone through the practices, procedures and general duties of the primary roleplayers, we will focus on the appropriate language for minutes.

Minutes are formulated from tape recordings or notes made by the secretary while listening to the conversations. Usually the secretary should concentrate on taking notes based on the gist of the discussion, i.e. select and summarise the main points made.

Meetings follow the points on the agenda, so the same subheadings can generally be used. The following proforma is a useful tool.

Name of Organisation: Purpose of Meeting: Date/Time: Chair:			
Topic	Discussion	Action	Person Responsible
1.			
2.			
3.			

Note that, while a secretary may use point-form in taking notes during the meeting, **full sentences should be used in the minutes**.

In addition to the conventions of business writing mentioned in the study guide so far, note also the following:

- Minutes are written in the **past tense** because the meeting has already taken place.
- Minutes use **reported speech,** also known as indirect speech, to record a member's direct statement.
- Headings do not end in full stops, but all sentences below them do.
- Dates are written as

  On **14 July 20** …
  On **the 14th of July** …

Any other date convention is incorrect. **Use the same format throughout your text**.

- In South African English, the titles

  Mr Ms Mrs and Dr are not followed by full stops; however Prof. and Adv. etc. are.

  Rule: If the word and the abbreviation end on the same letter, there is no full stop (**M**iste**r – Mr)**. If the abbreviation and the word do not end with the same letter, there is a full stop (**P**rofesso**r - Pr**of.).

- Resolutions passed in the meeting may be written as follows:

  RESOLVED: That an amount of R 12 000 be transferred…

- Changing verbatim records (i.e. conversation; spoken English) into minutes

Minutes may be written as follows	Do not use direct speech unless quoting someone
past simple Mr James was responsible for gathering… or Mr James said that he was responsible for gathering quotes…	present simple I am responsible for gathering quotes…
past continuous Staff were travelling by bus...	present continuous The staff are travelling by bus…
past perfect simple The CEO had been to five meetings... The CEO said that he had been to five meetings	present perfect simple I have been to five meetings ...
past perfect continuous The secretary had been working very hard to get the minutes out on time…	present perfect continuous Mr Zulu said, "The secretary has been working very hard to get the minutes out on time…"
past perfect She said that she had written the minutes. (She wrote the minutes *in simple past would be correct also*)	past simple I wrote the minutes.
past perfect continuous He had been waiting for the email...	past continuous I was waiting for the email…
past perfect NO TENSE CHANGE POSSIBLE The meeting had started when Mr Mandela arrived	past perfect The meeting had started when I arrived.
past perfect continuous NO TENSE CHANGE POSSIBLE Julia had already been researching for the new product at the CSIR…	past perfect continuous Julia Sithole said, "I had already been researching for the new product at the CSIR..."

Note: Avoid writing "He/She/They (etc.) said…" throughout the minutes, i.e. do not record what every person said in turn.

Remember that minutes are about what members decide must be done, by whom and by when – and not a full record of the conversation.

- Expressions of time if reported on a different day

That	This
Yesterday	Today
Those	These
Then	Now
Before	Ago

The previous	Last
There	Here
The following	Next
The next or following	Tomorrow

- Meeting terminology

  You may find the following table helpful. Notice that terms derived from Latin are usually typed in *italics*.

WORD	**DEFINITION**
ADJOURNMENT	Postponement (to 'adjourn' a meeting means to stop or suspend it for a period of time and return to it at a later time).
AD HOC MEETING	A special meeting called for one particular purpose and for no other.
AGENDA	List of items to be discussed at the meeting, sometimes called an order paper; the programme that will be followed.
BALLOT	A vote or procedure for secret voting, such as writing on a piece of paper which is put in a box so that no one can identify the voter.
CASTING VOTE	Deciding vote; a second vote given to the chairperson when equal numbers of people are for and against a proposal. The casting vote will decide the outcome.
CHAIRPERSON	The person who is in charge of the meeting. Note that the terms 'Chairman' and 'Madam Chair' are outdated – the person chairing a meeting is either called the 'Chair' or the 'Chairperson'.
CLOSE	When a meeting has ended it is said to have 'closed'. To adjourn a meeting means to stop and start again later at a given time.
CONSENSUS	A general agreement on a matter or point of discussion.
CO-OPTED MEMBER	Someone selected by a vote of the members to take up a specific office (e.g. treasurer) or membership.
DISSENTING VOTE	A vote against a proposal.
HELD OVER	The matter will be discussed at a later meeting; sometimes the phrase 'carried forward to the next meeting' is used.

MINUTES	A record of what transpired at a meeting, what was said and decided. Note that we treat this word as plural: 'The minutes were…' We can use the word as a verb e.g. 'This was not minuted accurately…'
MOTION	A formal statement of what is proposed; it becomes a resolution once the meeting has agreed to it.
NOTED	Usually at the direction of the chairperson, an opinion or point of fact is acknowledged to be important and may require further thought, debate or action. At this point it is not discussed further, but is recorded for information purposes.
PRECEDENT	A decision about an issue that was taken before that can influence later decisions about similar cases: a decision that sets an example for subsequent decisions on similar matters.
QUORUM	The minimum number of people required to make binding decisions at a meeting.
RESOLUTION	Once a motion or proposal is accepted, it is called a resolution. Usually the precise wording is important.
RESOLVED	Decided / agreed
STATED	Remarked, gave an opinion or point of information.
TREASURER	The person who controls the finances.
UNANIMOUS	Everyone agrees to a proposal/ all are in complete agreement.
PROXY	A document in which one person authorises another to vote on his/her behalf because he/she cannot be present at the meeting.
POINT OF ORDER	Someone can ask the chairperson to rule on something that might be considered improper conduct at the meeting, i.e. not following proper procedure.
AMENDMENT	Change or correction made to the documentation or to a resolution.
ADDENDUM	Appendix; annexure
EX OFFICIO	By virtue of one's office, e.g. the head of department, whoever that might be at the time, is automatically a member of a committee
IN CAMERA	In private; confidential
VERBATIM	In the exact words that were used

- **Format of minutes**

There are two main formats in which minutes of a meeting can be written, namely the **linear** and the **table** form. Both are acceptable.

The linear form

ESKOM

Minutes of a meeting of technical staff supervisors held in the Mkondeni Boardroom, on 19 July 2011 from 08:00 – 11:00

1. Welcome

The Chairperson opened the meeting and welcomed everyone present.

2. Present

Mr N Semunya (Chairperson)
Ms AJ Asmal (Secretary)
Mr H Ramaphosa (Human Resources)
17 staff members as per attached attendance register.

3. Apologies

Mr S Ramsurap

4. Minutes of the previous meeting

Minutes of the meeting of 14 June 2011 had been circulated and were taken as read. The minutes were approved subject to the following correction:
Item 2 Attendance: The spelling of Mr Semunya's surname was corrected.

5. Matters arising from the previous meeting

5.1 New computers (point 6.1 of the meeting of 14 June)

Mr Smith reported that the 20 new computers had been purchased and would be installed by 22 July 2011.

6. New matters

6.1 Low productivity

Mr Breytenbach reported that the department was experiencing a lower level of productivity as employees were taking time off to attend to private affairs during work hours. Members agreed that staff could work-in the hours that they took off for private affairs. Mr Ramaphosa of Human Resources would attend to the administration by 31 August 2011. This motion was passed.

6.2 Inefficiency in the department

Ms Naidoo said that a poor technical standard was lowering productivity in the department. Members agreed that staff would be evaluated for further training. Mr Ramaphosa would report back training outcome by November 2011.

General

7.1 Personnel meetings

As far as possible, personnel meetings would be held on the last Friday of every month.

7.2 Casual Day

Mr Semunya reminded staff members of Casual Day on 25 August 2011 and that R10, for charity and the privilege of wearing casual clothes, was payable to secretary Ms Asmal. Staff members were encouraged to participate.

8. Next Meeting

25 August 2011

9. Closure

The meeting closed at 11:00.

N Semunya
N Semunya Date:_____________
Chairperson

The table format

<table>
<tr><td colspan="4">ESKOM
Minutes of a meeting of technical staff supervisors
held in the Mkondeni Boardroom
on 19 July 2011
from 08:00 – 11:00</td></tr>
<tr><th>AGENDA ITEM</th><th>Record of discussion and actions</th><th>Person responsible</th><th>Date due</th></tr>
<tr><td>1. Welcome</td><td>The Chairperson opened the meeting and welcomed everyone present.</td><td></td><td></td></tr>
<tr><td>2. Present</td><td>Mr N Semunya (Chairperson)
Ms AJ Asmal (Secretary)
Mr H Ramaphosa (Human Resources)
17 staff members as per attached attendance register.</td><td></td><td></td></tr>
<tr><td>3. Apologies</td><td>Mr S Ramsurap</td><td></td><td></td></tr>
<tr><td>4. Minutes of the previous meeting</td><td>Minutes of the meeting of 14 June 2011 had been circulated and were taken as read. The minutes were approved subject to the following correction: Item 2: The spelling of Mr Semunya's surname was corrected.</td><td>Ms Asmal</td><td></td></tr>
<tr><td colspan="4">5 Matters arising from the previous meeting</td></tr>
<tr><td>5.1 New computers (6.1 of 14 June).</td><td>Mr Smith reported that the 20 new computers had been purchased and would be installed by 22 July 2011.</td><td>Mr Smith</td><td>22 July</td></tr>
<tr><td colspan="4">6. New matters</td></tr>
<tr><td>6.1 Low productivity</td><td>Mr Breytenbach reported that the department was experiencing a lower level of productivity as employees were taking time off to attend to private affairs during work hours. Members agreed that staff could work-in the hours that they took off for private affairs. Mr Ramaphosa of Human Resources would attend to the administration by 31 August 2011. This motion was passed.</td><td>Mr Ramaphosa</td><td>31 August</td></tr>
<tr><td>6.2 Inefficiency in the department</td><td>Ms Naidoo said that a poor technical standard was was lowering productivity in the department. Members agreed that staff would be evaluated for further training. Mr Ramaphosa would report back on training outcome by November 2011.</td><td>Mr Ramaphosa</td><td>November meeting</td></tr>
</table>

7. General			
7.1 Personnel meetings	As far as possible personnel meetings would be held on the last Friday of every month.		
7.2 Casual Day	Mr Semunya reminded staff members of Casual Day on 25 August 2011 and R10, for charity and the privilege of wearing casual clothes, was payable to secretary Ms Asmal. Staff members were encouraged to participate.	Ms Asmal	25 August
8.Next meeting	25 August 2011	Ms Asmal	20 August
9. Closure	The meeting closed at 11:00.		

Note:

- Clearly designate who is responsible for the task and the due date. If large groups are responsible, their line manager should be designated as the responsible person.
- Record in this order: Venue, Day, Date and Time

Activity 2.5

Imagine that you were responsible for the following attendance list and notes taken at a meeting. Write the minutes of this meeting.

NOTES: PURCHASING DEPARTEMENT MEETING ON 13 SEPTEMBER 2001 IN ROOM 6-36 AT 08:30

Present & apologies

Here is the register you circulated for signature:

ATTENDANCE REGISTER for 13 September

Dr E Mtimkhulu (chairperson)	EMtimkhulu
Mr J Roets (secretary)	JRoets
Mr B Bron	BBron
Ms K Gavu	Gavu
Ms N Pillay	NPillay

1. Opening and welcome

Elizabeth welcomed everyone. Jaco said that Phillias Chokwe had apologised for not being able to make the meeting – he had a funeral he had to attend.

2. Minutes of the previous meeting (13 August 2001)
Nabeela surname must read 'Pillay'. Minutes are accepted. Proposer: Bron, seconder Gavu.

3. Matters arising:

3.1 Cleaner's duties

Kgomotso: The cleaner (Ms Moloi) still refuses to water plants & fill water tanks.

Elizabeth: It's in cleaner's contract that she must do these tasks.

Kgomotso: K has pointed this out to the cleaner, but she still refuses.

Elizabeth: Asks Kgomotso to start with disciplinary procedures.

4. New matters

4.1 Purchasing of paper for photocopiers

Ben: Several departments complain that we're buying a low quality paper.
It gets stuck in the photocopiers.

Kgomotso: We must go back to buying SABS approved paper. Volunteers to get quotes.

RESOLVED: Only SABS approved paper will be bought after 1 October. Jonas to do.

4.2 Appointment of a general assistant

Nabeela: We need someone to do administrative tasks (photocopying, deliveries, filing). doesn't get time for her own work.

Kgomotso: There is no provision in the budget for appointing a general assistant.

Elizabeth: Asks Kgomotso to see whether money could be transferred from other budgets to hire a part-time general assistant. Feedback – next meeting.

5 & 6. Date of next meeting and Closure

Elizabeth: thanks everyone! Ended 10:10. Next: 13 October at 8:30.

Feedback – Activity 2.5

Please check your version against this and make corrections where necessary.

XYZ Enterprises
Purchasing Department

Minutes of the Purchasing Department meeting held in Room 6 –36 on Thursday, 13 September 2001 from 08:30 – 10:10

PRESENT
Dr E Mtimkhulu – Chairperson
Mr J Roets – Secretary
Mr B Bron
Ms K Gavu
Ms N Pillay

1. Opening and welcome

Dr Mtimkhulu declared the meeting open and welcomed everyone.

2. Apologies

Mr P Chokwe

3. Minutes of the previous meeting (13 August 2001)

Ms Pillay's surname was corrected and the minutes were adopted.

4. Matters arising

4.1 Cleaner's duties

Ms Gavu is to initiate disciplinary procedures against Ms Moloi who refuses to fulfil her contractual duties of watering plants and filling water tanks. Report back on 13 October

5. New matters

5.1 Purchasing of paper for photocopiers

Paper was getting stuck in photocopiers due to the poor quality of paper. Ms Gavu would get quotes for SABS approved paper. It was resolved that only SABS approved paper would be purchased from 01 October.

5.2 Appointment of general assistant

Ms Gavu would find out if a budget transfer could be managed to hire a part-time general assistant to assist with work overload. Report back by 13 October.

6. Date of next meeting

The next meeting would be held on 13 October at 08:30. The venue would be confirmed.

7. Closing

The meeting was closed at 10:10.

A good summary based on your notes or any verbatim recording identifies the main ideas (action required, main reasons, person responsible and deadline) that were discussed under each agenda point.

Activity 2.6

Below is a transcript (exact words written down) of what was said concerning "agenda point 5.2" of a meeting. Your task is to minute "agenda point 5.2" under a brief, descriptive heading.

Summarise by identifying main ideas, and adjust the English usage and style.

Transcript of part of the meeting: Agenda Point 5.2

Ms Gibson (Chairperson): Now let's move on to item 5.2, the parking problem. Mr Moloto's team has been looking into this for some time, and has a few options for us to consider. Mr Moloto, over to you…

Mr Moloto (Director: Support Services): Yes, we've been trying to find a way out of the present mess. There are just too many cars and too little parking space. Our staff complement has grown by 24% in the past two years alone, and with our pathetic public transport system more of them now drive their own cars. Look, **we can either buy the empty bit of land across the road, or we can relocate completely to a place that already has enough parking**.

Ms Green: But why can't we just clear the space in the north-east corner and pave it for parking? I mean, two of the trees have fallen over and the fish pond has (has what?)! The lawn has more weeds than grass! I've been working here for seven long years without my own parking. I'm sick of having to come early just to get here before someone grabs the last parking spot.

Mr Baloyi: Yes, and my bakkie was stolen because I parked it outside the gate. Got only R5000 from the Insurance, enough to buy a bicycle! There's no way I'm going to park across the road, unless you can guarantee my car's safety, and pay the insurance.

Ms Gibson: Mr Moloto, tell us what each of your options would cost us? I suppose we'll keep growing for the next few at least. Maybe we should invest in a bit of infrastructure.

Mr Moloto: It would cost us about R490 000 to buy the piece of land across the road. Not a bad price in this part of town. Then throw in an other R300 000 for paving, fencing, an electric gate and shaded carports.Then maintenance and security, but they come later.

Ms Green: The problem is that parking is not the only problem. Our **buildings are also just too small**. We haven't even got a tea room anymore. I always liked going there to chat with colleagues. Team spirit and all that…

Mr Baloyi: I agree. We predict that our organisation will continue to grow, and it would be much smarter to get out of this dump. The electrical and plumbing systems need to be redone, and a lot of costly renovation in addition to mowing the so-called lawn…

Ms Gibson: And the other option?

Mr Moloto: We have identified a property just 2.5 km from here that has lots of potential, and that would surely meet our needs for decades. It's up for grabs at R17m. We might get about R9m for this place. We'd have to move fast – that place won't stay on the market forever.

Ms Gibson: How about **commissioning a feasibility study**? I mean, let's rope in a consultant to investigate this option quickly and thoroughly, with detailed estimates of relocation costs. Also to make sure that the new place would meet our needs. What do you think?

All: Sounds good. O.K. Let's go for it.

Feedback – Activity 2.6

The task involves identifying main ideas (as highlighted in the transcript above), summarising, changing spoken to written style and adopting a neutral tone. Here is an example:

5.2 Insufficient parking facilities

Mr Moloto, Director of Support Services, stated that there was insufficient parking space because the organization now employed more staff, and because more were using their own vehicles to come to work. He stated that there was not enough space on the premises to extend the parking facilities adequately, and identified two options: purchasing the vacant land across the road for development as a parking area, or relocating the entire organization to new premises with adequate parking facilities.

The first option would cost at least R790 000. Regarding the second option, he indicated that a suitable property was currently on the market for R17m, and estimated that the existing premises would sell for approximately R9m.

The chairperson felt that it might make more sense in the longer term to invest in more adequate infrastructure for parking as well as other purposes, and proposed that a consultant be commissioned to carry out a feasibility study relating to relocation costs and to whether the new property would meet all of the organisation's development needs. The meeting agreed that this should be done.

Some other ways of ending:

the proposal was unanimously adopted.

or

The motion was carried by 17 votes to 14 (Proposed by JS Smith; Seconded by H Hlongwane).

or

<u>**RESOLVED**</u>

That a consultancy be commissioned to carry out a feasibility study relating to relocation costs and to whether the property would meet all of the organisation's development needs.

You may shorten the minutes even more, provided that no confusion arises, as follows:

5.2 Insufficient parking facilities

Mr Moloto, Director of Support Services, said that more staff were using their own vehicles. There was not enough space on the premises to extend the parking facilities. The Committee identified two options: purchasing the vacant land across the road for development as a parking area (estimated cost R790 000), or relocating the entire organization to new premises with adequate parking facilities (estimated cost R17m).

The company needs bigger facilities in general and the Committee resolved to commission a feasibility study relating to whether or not property XYZ would meet the organisation's development needs, and to assess the cost involved.

Activity 2.7

This activity requires that you formulate the minutes of an *entire meeting* from a transcript.

You are employed in the Protection Services Department of an organization, and have received the following notice of a meeting. As secretary you must write the minutes. Use information from the agenda and the transcript to write the minutes in an appropriate format.

LINWOOD STEEL MANUFACTURING
PROTECTION SERVICES DEPARTMENT

To: All members of staff

NOTICE OF MEETING

Please note that the next meeting of Protection Services staff will be held in the Clover Boardroom on Friday, 12 October 2011, at 08:30.

AGENDA

1. Welcome
2. Present
3. Apologies
4. Minutes of previous meeting
5. Matters arising
   5.1 Punctuality
6. New matters
   6.1 Health and Safety: access to danger zones
   6.2 Parking problems
   6.3 Responsible use of photocopy machine
   6.4 Vandalism of company property
7. General
8. Date of next meeting
9. Closure

Nthabiseng Motong
Secretary to Director: Protection Services

Transcript:

The main ideas are highlighted to assist your understanding and selection.

Ms Stein:	Well, it's just about **half past eight**, and I think we can start. Thank you(Chair) all for coming. Please sign the attendance register that's going around. Are there any apologies?
Mr Khumalo:	Yes, **Piet Vrede** asked me to **apologise** for him. He's at some sort of skills development workshop in Kuruman this week, and wants to spend the weekend with his aunt who stays somewhere there.
Ms Stein:	OK. Have you all looked at the **minutes of our last meeting**? That was on the **21st of September**. Any corrections?
Ms Zengele:	Nothing – they're **perfect**!
Mr Sethole:	Yes, much better than last time!
Ms Stein:	Good. Then let's move on. **Matters arising**? Is there anything we need to finish off? Oh yes, I remember now. Look at **item** **6.3**. It seems most staff have responded positively, but there are still some who ignore our appeal for punctuality. This is just unacceptable, and I think it's time to start **sending out written warnings**. Anyone want to raise anything? No? OK, let's move on to the **new matters**. The **first** one is the **safety issue**. We somehow have **to keep clients and staff away from the areas where we store the chemicals**. Some of them are explosive and some are poisonous. The last thing we want is to get into the papers because of some terrible accident here. The other day I came across two visitors in there trying to find their way back to Reception. I'm not sure how to deal with this, though. Any ideas?
Mr Steenkamp:	There's a big red notice on the wall. Anyone who ignores it deserves what they get, in my opinion. Do we have to lock every door in the place? Or put up barricades with armed guards in every passage? This is ridiculous…
Mr Ledwaba:	Why not take the technology route, and install a fancy access card system for the whole place. Might cost a fortune, but maybe we should look into it.
Ms Stein:	Hold on a bit. I want you all to think about this one, and let me have your suggestions by the end of October. A short email will do. **Mr Steenkamp, would you look into this access card idea in the meantime and let us have some info. at our next meeting**? The **next** thing we have to sort out is the **parking**. I've had quite a few complaints from visitors about this recently. They apologise for being late for their appointments and say they couldn't find parking anywhere. Our staff on duty tell me that it's because staff park there because it's closer to the main entrance. If you all agree, I'm going to tell them to clamp the wheels of these cars and only release them on payment of a R250-00 fine. Our visitors are our business and we have to look after them.
Mr Blake:	Excuse me. We're not just too lazy to walk from our cars. We can't find parking in the mornings either. Why should Visitors Parking stay open when the people who actually work here have nowhere to park?
Ms Benco:	Yes, I feel the same. We have to park somewhere, you know.

Mrs Woolter: I also struggle in the mornings. I would be happy to park somewhere else, if there was somewhere else. Can't we do something?

Ms Stein: Well, it seems the problem is bigger than we thought. **I'll speak to the Director about it and we'll see if she has any solutions offer**. I'll let you know.

Then there's the **photocopy machine**. We now have many more staff using it, and I think we need tighter controls. I've asked my **PA to get an access code for each department so the costs can come off each department's stationery budget**. This means the copies we make will come off our own budget. I don't want to police this thing too much, but please use the copier only for work purposes and don't waste. Since we share the machine with two other departments, please see to it that they get a fair chance to use it. If this doesn't work we'll have to think of even tighter controls, but let's give it a try.

The next item is **vandalism**. There's been quite a lot of it lately, and the Board of directors is aware of what's going on. I'm sure none of you is involved, but we have to warn everyone that **deliberate damage to property belonging to this organization will lead to dismissal. If you see anything, please report it to our Director immediately**.

I don't have anything under General. Do you?

Mr Lendore: I'd just like to remind everyone that this Friday is **Casual Day** again. Dump all your coins in the secretary's office, and they'll go to charity. It's the **first Friday of every month**. So far this year we've raised **R8 000** for good causes.

Mr Ledwaba: Yes, thanks. I think we need to revisit our **staffing situation**. We just can't cope with our **workloads** any more…

Ms Stein: I don't think we can get into that here. It's a big issue. If you want us to discuss it, please **put it on the agenda for our next meeting**.That will be **on 12 November, same time, same place**. It's just about **10:00** now, so we need to wrap up.

Thanks again for coming…

Feedback – Activity 2.7

LINWOOD STEEL MANUFACTURING

PROTECTION SERVICES DEPARTMENT

Minutes of a meeting of Protection Services staff held in the Clover Board Room on Friday, 12 October 2011 at 08:30

1. **Welcome**
   The chairperson welcomed staff.

2. **Present**
   Attendance register is attached.

3. Apologies
Piet Vrede

4. Minutes of the previous meeting (12 September 2011)
The minutes were adopted.

5. Matters arising

5.1 Punctuality (Item 6.3 in previous minutes)
Staff who are not punctual will henceforth receive written warnings.

6. New Matters

6.1 Health and Safety: Access to Danger Zones
Clients and staff must be kept away from the danger areas. Mr Steenkamp is to look into an access card system. Staff may e-mail suggestions to Ms Stein. All feedback is expected by 25 October 2011 for discussion on 12 November 2011.

6.2 Parking problems
Clients and staff are experiencing difficulties as a result of insufficient parking. Ms Stein will give feedback on 12 November 2011 after discussions with the Director

6.3 Responsible use of photocopy machine
Ms Stein's PA will issue an access code by 30 October 2011 to each department for costing to its stationery budget and use control.

6.4 Vandalism of company property
Staff were warned that vandalism could lead to dismissal. Staff were requested to report vandalism to the Director.

7. General

7.1 Charity Fund
Staff were reminded to leave donations with (name) for Casual Day on the first Friday of every month. R8 000 has been collected so far.

7.2 Staff shortage
Staff workloads are too high. Miss Motong is to place this as a new item on the agenda for the 12 November 2011 meeting.

8. Date of next meeting
12 November 2011

9. Closure
The chairperson closed the meeting at 10:00 and thanked staff for attending.

Signature

Secretary to Director: Protection Services

4. CONCLUSION

You should now understand the importance of minutes for good decision making, with wider participation in management. You should have a sense of how meetings should be chaired to avoid wasting valuable time. You are aware of the skills needed to write minutes that are useful, and you will continue to develop these.

Study Unit 3
Report writing

1. INTRODUCTION

Reports channel information 'upwards' in an organisation, keeping managers informed of developments on the ground so that appropriate decisions can be taken. Reporting is usually included in the responsibilities of individual positions and structures such as sections or departments, committees and project teams. Where the need arises a manager assigns an additional and specific reporting task to an individual, team or committee.

There are many types of report, reflecting differences in the purpose and context of the particular reporting task. A report may be a stand-alone document for a specific situation, or may be part of a larger reporting system in which a number of reports from various sections of an organisation are collated to cover the organisation as a whole. An Annual Report, for example, is a collation of reports from all departments and is presented by a Chief Executive Officer (CEO) to a company's stakeholders.

A number of business communications may be linked to achieving one outcome. A suggestion may be made in a memo or email that may lead to a meeting. This may in turn lead to a request for a report that is presented orally or in writing. Furthermore, recommendations made in a report may be expanded to become a proposal. In addition, a business plan that shows how recommendations can be implemented, may be required. A management team might ask the writer of a proposal to do a presentation on it. These are just some of the ways in which workplace documents and processes are interlinked.

Here are some recognisable purposes that differentiate reports. Note, however, that a report can have more than one purpose.

- **Evaluation reports** – assess facts to establish whether or not, for example, money was well spent on a particular project such as a training course, the introduction of new technology, or specific policies and procedures. Recommendations may involve scrapping the project or implementing small changes.
- **Feasibility study** – reports evaluate whether or not a proposal or recommendation should be implemented, considering the available resources.

Management may wish to establish whether or not a fire-damaged building can be restored or must be rebuilt, and whether costs can be recovered by the company.

- **Incident reports** – record exactly what happened. These often describe accidents or misconduct in the workplace as accurately as possible.

- **Information reports** – serve to inform about events, people and circumstances. A manager may want to be informed about a conference that one of his staff members attended. Committees, departments and project teams are often required to report regularly on whatever activities they have been engaged in.

- **Investigative reports** – systematically investigate a specific problem and recommend a course of action to deal with it.

- **Performance reports** – evaluate productivity and recommend courses of action to improve employee productivity. Most organisations have their own performance evaluation systems and formats. Sometimes these reports are linked to bonus or other reward systems.

- **Progress or Interim reports** – these present the objectives, achievements to date and challenges relating to a task or project that is still underway. A number of these reports could be written before a final report is written.

- **Productivity reports** – undertake a cost-benefit analysis using information on actual production. This is similar to a feasibility study, but here the 'production' has already been done. For example, you could weigh up the cost of making a product against the income it has generated, or you could find out whether there has been an increase or decrease in the number and quality of whatever is produced.

- **Report on corporate research project** – experts within or external to the organisation are sometimes commissioned by management to find information that is not already available. For example, a consultant may be contracted to research the extent to which a company's public image has been damaged by pollution caused by the company.

- **Sales reports** – these are similar to productivity reports, but are limited to information about sales of a product or service.

- **Technical reports** – usually evaluate and present data in scientific formats such as statistical tables and graphs in order to support recommendations for improving business. An example would be a technical report on a new car that is being prepared for market release.

Organisations often have their own style and format requirements. These can usually be adapted to suit a particular situation or task. However, it is necessary that you understand the underlying principles of report writing before you adapt or create a format to suit your specific purpose and circumstances.

The degree of formality and the length of reports can vary greatly, from single-page memorandums to several bound volumes.

2. SHORT FORMAL REPORT

Investigative reports are a management tool used to identify problems, gather information, explore the circumstances, present possible solutions, draw conclusions and in the end, recommend the best course of action.

In the professional world, the pace of operations seldom permits those in authority sufficient time to gather the information they need. Managers frequently ask their staff to collect the information they require to make decisions and to solve problems. Insufficient or inaccurate information may have an adverse impact on the quality of managerial decision-making. It is important that a report should be based on facts, documentation and other evidence, and that it should include a section on the methods of investigation, as this will confirm the reliability of the information provided.

Usually the person tasked with the report not only **collects** the information, but **analyses** it and suggests solutions to problems. Managers generally value the views of the person who has been directly involved in the investigation of a problem, but reserve the right to make the final decisions themselves.

The Short Formal Report is useful in that it has a conventional set of headings that reflects the underlying logic and structure of investigative reporting. The following set of subheadings is generally used:

1. **Terms of reference – a statement of the problem to be investigated, the names of person(s) commissioning the report, the scope and time frame of the investigation. Accordingly, this section shows who authorised the investigation, and what you are authorised to investigate.**

2. **Procedures – steps taken to investigate the problem; method and sources of information. This section shows what aspects of a problem were covered by your investigation, and shows whether the information you provide is accurate and reliable.**

3. **Findings – what factual information was found when you carried out each procedure.**

4. **Conclusions – discuss, comment, interpret, analyse the factual information in your Findings. (Do not suggest any action, as that comes in the next section.)**

5. **Recommendations – suggested actions to improve the situation, based on your conclusions. (Suggestions are not instructions or commands, so formulate them carefully – without using ‘must’.)**

Some organisations have adapted this, using different wording in some of the subheadings, and present the report in memorandum format. However, the structure of the two versions is essentially similar, as illustrated in the table below.

<table>
<tr><th>SHORT FORMAL REPORT</th><th>MEMORANDUM REPORT</th></tr>
<tr><td></td><td>(Company name) XYZ
MEMORANDUM REPORT

Department Finances
My Ref 22/6/72
Your ref 56/22/5

Date 22 June 2011

To Mr A D James
(Title) CEO

From Ms F J Horne
(Title) Chief Accountant</td></tr>
<tr><td colspan="2">Title – write a short heading that indicates the problem and context, e.g. REPORT ON AN INVESTIGATION INTO…AT….</td></tr>
<tr><td>1. Terms of reference
This section provides what is sometimes referred to informally as a Brief or Scope. You must refer to the:
• date the report was requested or commissioned,
• the name of the person who commissioned the report,
• what the report is about
• include any other limitations to the scope, such as a time frame.</td><td>1. Introduction
• Background
• Purpose
• Scope</td></tr>
<tr><td>2. Procedures
The steps taken to collect information; method of investigation. Here are some examples:
• Questionnaires
• Interviews
• Consultations
• Meetings
• Research
• Documents
• Personal visit
• Observation</td><td>2. Sources of information
Describe where you got your information from.</td></tr>
<tr><td>3. Findings
Factual information found during investigation.</td><td>3. Results
Factual information.</td></tr>
</table>

<table>
<tr><td>4. Conclusions
Comments, analysis and interpretation of the factual information. Various implications and options that could be implemented may be included in the discussion:
• Financial
• Legal
• Staffing
• Infrastructure
• Communication
• Productivity
• Health & Safety</td><td>4. Discussion
Comments, analysis and interpretation of the factual information. Various implications and options that could be implemented may be included in the discussion:
• Financial
• Legal
• Staffing
• Infrastructure
• Communication
• Productivity
• Health & Safety</td></tr>
<tr><td>5. Recommendations refer to
The best options or actions to correct the problem that was investigated.</td><td>5. Recommendations may be written as for SFR but usually limited to one or two sentences.</td></tr>
<tr><td colspan="2">Ending

Signature
Ms FJ Horne
Date

Reports do not end with any salutation such ‘Yours sincerely’ or ‘Kind regards’.</td></tr>
</table>

Some organisations use pro forma paper or electronic templates to ensure that reports and other submissions are presented in a standard format.

Here is a short story that describes how the conventional subheadings should be used.

Tumi Lephalala visited a doctor, complaining of a sore throat and cough (this is the problem to be investigated, and Tumi has authorised the investigation by making the appointment on a fixed date. These give us the **Terms of reference**).

The doctor examined Ms Lephalala. He took her temperature, looked at her throat and listened to her chest. (These are the **Procedures** followed to collect information).

The doctor discovered that Tumi’s throat was inflamed, she had a temperature of 39˚ and her lungs were making characteristic rattling noises (these are the doctor’s **Findings**).

The doctor decided that Tumi had bronchitis (this diagnosis is his **Conclusion**).

The doctor gave Tumi a prescription to buy antibiotics and a cough mixture at the pharmacy, and advised her to get some rest (these are his **Recommendations**).

Now we can discuss the format in more detail.

Title

Begin with: **REPORT ON AN INVESTIGATION INTO**…, and complete the title with an indication of what you have investigated, and in what context. Here is an example:

REPORT ON AN INVESTIGATION INTO POSSIBLE BENEFITS OF INTRODUCING WIRELESS INTERNET CONNECTION IN THE DEPARTMENT OF PETROLEUM AFFAIRS

This type of report usually has five main sections which we will describe and illustrate.

Terms of reference

In this section you provide the background to the problem or need, state who commissioned and authorised the investigation, and specify what you are authorised to investigate. Here you should:

- give the name and official capacity of the person who commissioned and therefore authorised the investigation, and the date on which you were given the task;
- introduce the problem by providing some background information, and describe precisely what you were authorised to investigate (this defines the limits of the investigation);
- if you were only authorised to investigate for a limited period, give the date by which the investigation must be completed.

The terms of reference are sometimes referred to as the 'brief' or 'scope' of an investigation.

Example:

1 Terms of Reference

On 6 June 2013 Dr James Spencer, Director General of Petroleum Affairs, requested that an investigation be carried out into the possibility of introducing wireless Internet connection (WiFi) in the Department of Petroleum Affairs. A recommendation to be submitted to the Deputy Director by 30 September 2013.

Procedures

Procedures refers to the steps taken to investigate the problem, i.e. your method of investigation. Describe **how** you collected the data and where you got it from – your sources of information.

Decide how you are going to find information about various aspects of the problem you are investigating. Usually you will need to obtain information from various sources and in different ways. This can include obtaining information directly from people by means of letters, memos, telephone calls, interviews, questionnaires, meetings, publications or any document in your organisation's filing systems. You may also personally inspect conditions, analyse systems or observe and evaluate processes. These are some questions you could ask yourself:

- What do I need to find out?
- Are there any individuals or small groups that I can speak to in order to obtain the information required?
- Should I conduct a survey to collect information from a large number of people?
- Are there existing documents that I can use?
- Can I personally inspect or observe anything?
- Are there experts in the field who could possibly provide information?

In writing your report you will describe these in the past tense, since you will have carried out the procedures. Your procedures are important because everything that follows in the report is derived from them. They should show that your information is comprehensive and reliable, and that it is safe to take decisions on the basis of your report.

Example:

2. Procedures

The procedures followed in order to collect the necessary information were:

2.1 An inventory was made of existing office equipment in the Depart ment of Petroleum Affairs. This was compared with the equipment and methods of working at ESKOM where WiFi has been used for the past six years.

2.2 Interviews were conducted with 12 members of staff, six within the Department of Petroleum Affairs and six at ESKOM (see attached interview schedule – Addendum 1).

2.3 Questionnaires were distributed to all members of staff in the Department of Petroleum Affairs and at ESKOM (see attached questionnaire – Addendum 2).

2.4 Operational problems identified within the Department of Petroleum Affairs were discussed with management and departmental heads.

You will notice that no information, discussion or decision is presented in this section.

Findings

For each activity listed under your Procedures, there should be a set of findings. You should not draw conclusions or express opinions at this stage. Realistic and precise facts and figures should be given. (For our purposes these need not be real or true – you can simply make them up.)

Use corresponding numbering each time e.g. Procedure 2.2 will correspond with Finding 3.2.

Example:

3. Findings

Based on the procedures described above, it was found that:

3.1 Disruptions to Internet connectivity frequently bring work to a standstill, as communication between branch offices is via Internet.
At ESKOM members of staff each have a PC on their desks and work directly on the machine. They have been able to rationalise personnel, reduce paper wastage, and save man-hours. They have WiFi connectivity which

- facilitates sending and receiving files online.
- permits faster response times.
- has the capacity to deal speedily with large files.

3.2 In the Department of Petroleum Affairs all six members of staff described their frustrations in coping with routine tasks. Those at ESKOM indicated their satisfaction with the way in which the PC and particularly WiFi assisted them with routine work. Productivity at ESKOM is at least 30% higher than it is in the Department of Petroleum Affairs.

3.3 The completed questionnaires confirmed the frustrations being experienced by staff in the Department of Petroleum Affairs compared with those at ESKOM.

3.4 Managers interviewed expressed their dissatisfaction with the time taken by a large staffing complement to successfully complete routine tasks. Department heads complained about the time taken to laboriously transfer data in smaller chunks. They also cited the expense and frustration experienced when the Internet dependent systems were down.

Conclusions

On the basis of your findings, you will be able to reach certain conclusions**.** In this section you analyse, interpret, comment on, evaluate and/or discuss the significance and implications of the factual information you have presented as findings. State clearly what you think the facts/statistics show. At this stage you should be careful not to suggest any solutions, as this may be done only in the next section of the report.

Example:

4. Conclusions

From evidence in the findings above, we can conclude that

4.1 the use of cable as opposed to WiFi causes frustrations amongst members of staff, is not cost-effective and accounts for many wasted man-hours.

4.2 the use of WiFi results in a confident, efficient and professional staff.

4.3 reliable access to Internet PCs facilitates the speedy completion of routine tasks, allowing more time for quality customer service.

4.4 acquiring the latest technology results in financial cost savings and in the emotional wellbeing of members of staff at all levels within the organisation.

Note that the numbering does not necessarily correspond with that of the Findings, because sometimes the same general conclusion is supported by a number of findings.

In more complex reports you could present your conclusions under subheadings such as: **Financial implications**, **Legal implications**, **Staffing implications** and **Communication implications**, if any of these are relevant.

Recommendations

Finally, in recognition of the fact that you were directly involved in the investigation, you may be expected to make **recommendations** based on your findings and conclusions. This does not, however, give you the authority to take decisions.

Begin with the introductory statement: ‘It is recommended that...’ and follow this with a list of recommendations. You need to suggest what *could be done* to improve the situation. Be very specific and practical. You need not explain why you are making the recommendations – the preceding sections of the report should be sufficient evidence to support what you say. Be careful not to make recommendations that are not supported by your investigation.

The recommendations are suggested actions to put matters right and solve specific problems. The report writer is not in a position to take decisions or give instructions. For this reason you should avoid using the words 'must' and 'will'; use 'should' instead.

Example:

5. Recommendations

5.1 WiFi should be installed in all buildings as soon as possible.

5.2 Members of staff should be given information and training relating to WiFi Internet access.

5.3 Offices should be rearranged to accommodate the new technology to capitalise on the time- and space-saving measures.

5.4 Members of staff should be trained to maximise the benefits of reliable Internet access for quality customer service.

5.5 Follow-up action should be undertaken within six months to gauge the changes in the attitudes of members of staff towards their work and their customers as well as the state of their emotional wellbeing.

It is also possible to formulate a recommendation by using only the word 'be' when it follows 'that'. For example, the first recommendation given in the example above could read:

5.1 It is recommended that WiFi be installed in all buildings as soon as possible.

Ending

Under your signature, print your title, initials and surname. Below this, give your designation (position in the organisation). Leave a line open and write the date.

Example:

RJKHUMALO
Ms RJ Khumalo

Senior Librarian

20 March 2014

When a report is prepared by a team, the names may be listed under

Compiled by:

With all the sections presented together, a short formal report will look something like this example:

REPORT ON AN INVESTIGATION INTO THE IMPACT OF THE NEW PERFORMANCE BONUS SCHEME WITHIN MERCHANT BANK LTD

1. Terms of Reference

On 29 March 2014, Dr Ivan Mzimela, Chief Executive Officer, requested an investigation into the impact of the current Performance Based Incentive Scheme. A recommendation to be submitted to the Executive Committee by 30 April 2014.

2. Procedures

Procedures followed in order to obtain the information contained in this report include:

2.1 A questionnaire measuring staff morale was sent to all staff for completion.

2.2 Comparisons of financial information were obtained, comparing last year’s costs on Incentives to this year’s cost.

2.3 An interview was conducted with The Ombudsman, in response to complaints being filed regarding the new Incentive Scheme.

2.4 Conferences were held with peer Financial Institutions to assess their Performance Based Schemes.

3. Findings

Based on the procedures listed above, the following was found:

3.1 Staff morale amongst non-managerial staff declined by 20%. Resignations have increased by 15%. Managerial staff morale increased by 5%.

3.2 Average bonuses paid to all staff equated to 10% of the total Salary Line. 3% of this was allocated to non-managerial staff. Previous year’s allocation for non-managerial staff was 8%.

3.3 The Ombudsman showed a marked increase in the number of cases being referred to them, in which the staff complained of practices deemed to be unfair incentives.

3.4 Other financial institutions had similar schemes for managerial staff only.

4. Conclusions

From the findings above, the following conclusions were reached:

4.1 Non-managerial staff found the scheme to be demoralising and felt that only the managerial staff enjoyed the benefits of the scheme.

4.2 In terms of incentives extended to managerial staff, the amount paid as incentives had increased from previous years. However, non-managerial staff received an average increase of 8% per annum. This had dropped significantly to 3% in 2014. Managerial staff had benefited despite a decline in the profits of the company.

The fact that staff were looking to The Ombudsman to address their concerns showed a lack of confidence in the current management structures to address their issues.

4.4 Other financial institutions found that by keeping non-managerial staff on an Annual Salary Increment Scheme, the staff were motivated to work harder and were looking at longer-term careers within the Bank.

5. Recommendations

It is recommended that:

5.1 Merchant Bank Ltd re-align the Incentive Scheme for managerial staff only. They need to separate the scheme from the non-managerial staff, who need to revert to an Annual Increment Process as negotiated with the Unions each year.

To further boost morale we recommend that a Performance Based Bonus Scheme be introduced for all staff over and above the Annual Increment Process.

Staff would not lose out on their increases each year and, should the company attain its stipulated targets, then an additional bonus would be allocated to each staff member, payable in April of each year, as negotiated with the Banking Council.

5.2 increases awarded to non-managerial staff each year need to be strictly negotiated and legislated with the respective Unions. Minimums and maximums need to be decided and strict control of the distribution of these increases needs to be put in place. Managerial staff should be remunerated based on company results and on business targets having been met.

5.3 if we were to implement an amended scheme, the referrals to The Ombudsman should decrease. We need to include The Ombudsman in the formulation of the new Scheme, as we believe he can offer valuable insight into preventing current complaints from resurfacing. He is a key player in ensuring that we are compliant with current government regulations.

5.4 we meet bi-annually with other financial institutions to compare the benefits of individual current incentive schemes. We need to remain globally as well as locally competitive. In order for us to retain key staff, it makes sense to offer similar incentives.

J Strydom

J Strydom
Director: Human Resources

27 April 2014

3. INCIDENT REPORTS

The main purpose here is to record an event as accurately and completely as possible. Examples include reports about events surrounding intruders, theft, violence, prison fights, and accidents that need to be recorded in detail. An Incident Report may form a part of documentation in a disciplinary procedure when misconduct is being investigated. Check that questions such as these have answers in your account of events:

- **Who** was involved ?
- **What** happened?
- **Where** did this happen?
- **When** did it happen?
- **Why** what was the cause or motive?
- **How** did this happen?
- **How many** were there?

Some organisations provide templates to ensure that critical information is not forgotten. An Incident Report may look like this correctional facility pro forma:

INCIDENT REPORT

Name of inmate(s)	Register number(s)	Quarters
___________________	___________________	___________________
Date of Incident	**Time**	**Place**
___________________	___________________	___________________
Incident		**Witnesses**
___________________	___________________	___________________

Description of Incident:

____

____

____

____

Signature of reporting Employee

____

Name and designation ____________________________

Date of Report ____________________

The example below could be used by a protection services company in the private sector. Incidents are usually logged in an Occurrence Book and recorded.

INCIDENT REPORT

A. Reported by:____________________ CB No:______________

Date reported:____________________ Time:______________

Place of occurrence/incident:__________________________

Occurrence/incident:

____

____

____

____

Signature:____________________

Action taken: __________________________________

____

____

Signature: ________________ Date: ____________

Findings / Decision / Resolution: ______________________________ ____ ____ Signature: ________________ Date: ______________

Where no template is available, deciding on a suitable format is part of the writing task. The subheadings will depend on the specific situation.

4. PROGRESS REPORTS

This type of report is often compiled to enable managers to monitor progress in the implementation of a project so that they can intervene timeously when problems are encountered. The title is formulated in the same way as that of the investigative report, but 'progress' replaces 'investigation':

REPORT ON PROGRESS MADE IN THE IMPLEMENTATION OF THE NEW OVERTIME POLICY AT ABC ENGINEERING

Under this title you can present your report using the following set of subheadings, but remember that you may develop your own to suit particular circumstances. The subheadings are self-explanatory and you should be able to apply what you have learned about report writing from the rest of this Unit to this framework.

Title 1 , Introduction 2. Description of project (background; objectives, target dates; resources, budget, etc.) 3. Work completed to date 3.1 Task 1 (or Phase 1) 3.2 Task 2 3.3 Task 3 4. Difficulties encountered 6. Next phase 7. Conclusions and recommendations

Example

In October 2011 a project was launched to electrify Zone 11 where households, community and business premises as well as street lights now need an electricity supply. The Mayor has asked a councillor in the Bredell Municipality to report on progress at the next council meeting.

In this case the report is presented in memorandum format, but it could also be presented as a stand-alone document.

Notice that when you present detail in annexures rather than in the report itself, you should still include the main points in the report, or it will not make much sense. There is perhaps too little information in this example.

BREDELL MUNICIPAL COUNCIL
MEMORANDUM

To	**From**
The Honourable AB Makoe	Mr C J Maseko
The Mayor	Councillor: Zone 11
BREDELL MUNICIPAL COUNCIL	
Your Ref 56/2000	**My Ref** 7/2/1

Date 10 February 2012

REPORT ON PROGRESS MADE IN THE ELECTRIFICATION OF ZONE 11, BREDELL MUNICIPALITY

1. Background

On 21 September 2011 the Bredell Municipal Council approved electrification of Zone 11, based on the applications received from households, community centres and businesses. Approved project dates: 15 October 2011 to 15 October 2012.

3. Description of Project

Electrification of households, community centre, businesses and street lighting in Zone 11:

Phase 1 – Preliminaries: Human Resources, Equipment

Dates: 15/10/2012 to 15/02/2012

Phase 2 – Earthworks…

Dates: 15/02/2012 to 10/07/2012

Phase 3 – Laying cables…

Dates: 15/04/2012 to 15/09/2012

Phase 4 – Electrification: Grids…

Dates: 15/05/2012; 15/06/2012; 15/07/2012

Phase 5 – Handover and Final Report…

Dates: 15 October 2012

4. Procedures and work completed

The Zone 11 Electrification Project Team has provided the following information in full:

4.1 All phases: Equipment has been ordered (Annexure A)

4.2 All phases: Security measures are in place (Annexure B)

4.3 Phase 1 and 2: Equipment has been received (Annexure C)

4.4 Phase 1: Human Resources: full complement employed (Annexure D)

4.5 Phase 1: Project Leader, Mr Jonas Mau has fallen ill. Assistant Chief Engineer Mr K Pillay will act in the interim.

4.6 Phase 1: Financial – within budget (Annexure E)

5. Challenges

At this stage Human Resources: Health and Safety, and Security: Anti-theft Measures are the main concerns. Committees have been appointed to manage these issues (Annexure F).

6. Phase 2

On schedule.

7. Conclusions

The project is running on schedule and within budget, but Health and Safety and Security require close monitoring.

8. Recommendations

It is recommended that the Security: Anti-theft Measures Committee submit weekly reports and that the Human Resources: Health and Safety Measures Committee submit monthly reports to Councillor C J Maseko: Zone 11.

Signature

C J Maseko
Councillor
Bredell Municipality

5. LONG REPORTS

A Long Formal Report usually involves input from a number of people about a big project with high expenditure. It has many of the conventions of a Short Formal Report, but has a number of additional features. Each organisation and each report will determine what is required. Consider the following examples:

- Elements of Long Reports

  A full traditional report is divided into two main sections: **Preliminaries and Content. The Preliminaries** are numbered with Roman numerals (i, ii…); the **Content** is numbered with Arabic numbers (1., 2.,…).

1.2.1 Section A: Preliminaries may follow this format:

Page 0 Title page
Page i Acknowledgements
Page ii Terms of Reference or Brief (formulate as for short formal reports)
Page iii Summary (also referred to as Executive Summary)
Page iv Table of contents

Page 0 Title page

REPORT ON AN INVESTIGATION INTO THE FEASIBILITY OF RENOVATING THE XYZ FACTORY, DAMAGED BY FIRE ON 01 JUNE 2011

PREPARED FOR: Mr A D Jones
Chief Executive Officer
XYZ Company
Johannesburg

PREPARED BY: Ms F J Horne
Chief Accountant
XYZ Company
Johannesburg

DATE: 15 June 2011

Page i – Acknowledgements

Acknowledgements

The writer thanks the following people for their assistance during this investigation.

Ms T Zililo, XYZ Factory Supervisor

Mr D J Proctor, Johannesburg Fire Department

Mr V Rodseth, Grinnacker Construction

The writer also wishes to record the invaluable editing assistance of Ms H Fourie.

Page ii – Terms of Reference

1. Terms of Reference

On 02 June 2011, Mr A D Jones, CEO of XYZ Company, commissioned an investigation into the feasibility of renovating the XYZ company building, damaged by fire on 01 June 2011.

Specific instructions were to:

1.1 investigate the extent of structural damage to the XYZ Company building;

1.2 consult Grinnacker Construction about best course of action;

1.3 investigate insurance status;

1.4 submit financial report: cost to budget, insurance and quotations.

Recommendations were requested to be submitted to the Executive Committee by 15 June 2011.

Page iv – Summary

2. Executive Summary

A summary is what the Executive Committee will look at first. The rest of the report functions as substantiating references. The summary should therefore show what is possible, what it would cost and what the company can afford.

A summary can only be written once the report has been written. Summaries will vary in length according to scope of the investigation and company conventions.

A basic formula that you may use to write a summary would be:

The contents of this report indicate that XYZ building may be renovated (Annexure …), that insurance pay-out covers cost (Annexure …), that budget can cover contingency costs (Annexure …) and that renovations can be done in three (for example)) phases so that least production disruption occurs (Annexure …).

Page iv – The Table of Contents lists all the major and minor headings in the report with page numbers for easy reference.

TABLE OF CONTENTS

Material that is too detailed to include in the body of the report is placed in the Annexure or Appendices. The writer would refer to this material in the body of the report.

Annexures or Appendices contain information in

- Detailed tables

- Detailed calculations
- Computer printouts
- Examples of Questionnaires
- Very detailed Specifications
- Transcriptions of Conversations
- Case histories …

7 List of Diagrams …
 7.1 etc …

8 List of Graphs …
 8.1 etc. …

9 List of Tables …
 9.1 etc. …

10 List of illustrations …
 10.1 etc. …

11 Glossary

A glossary is a special dictionary for the report. All technical terms are listed in alphabetical order and defined. Writers may also define difficult words at the bottom of the page or within the text. …

12 List of Symbols …

13 List of references

The writer should acknowledge any work written by someone else that has been used in writing the report. The List of References is placed at the end of the report.
References are set out *in order of appearance* in the text.

For example –

1. Van As, A. 1990. A Study of Paint Fires. *Journal of Paint Technology*, 6(2), April: 3–12.
2. Smith, B. J. 1988: 55–60. *Fire and damage in steel buildings.* London: ABC Press. …

14 Bibliography

The Bibliography – based on the references is written *in alphabetical order* of the surnames of the authors.

Contents 7 to 14 refer to **technical and reference information**. References and Bibliography are documents and books that may be consulted for information.

6. CONCLUSION

In Unit 3 you have considered the writing of various types of reports. While most businesses and government departments might have different ways of writing and presenting reports, the basic principles outlined and discussed in this unit are applicable.

Study Unit 4
Proposals and presentations

1. INTRODUCTION

In this unit we focus mainly on writing proposals, but will also consider some aspects of presentation skills. It would not be appropriate for us to offer computer training in the use of a particular software application for presentations.

When new business is pursued, various forms of professional documentation tend to be produced around the initiative. Any or all of the previously discussed business communication formats can be used in the process of realising one business objective. For example, reports and proposals are often the substance of presentations in that you *present* your report or proposal to a live audience. As the proposal develops, it may be linked with a range of correspondence. A recommendation made in a report, a suggestion made at a meeting, an idea that you put forward in a relatively informal email can all be further developed as a formal proposal. Managers will need the more formal and systematically developed document before they give the go-ahead to implement a large and expensive project.

Proposals can be developed to bring about change within an organisation, but can also be used when one company or service provider is able to meet the needs of another organisation that lacks the expertise or capacity to get a particular job done. When an organisation needs an external provider, it often advertises its needs in a tender process. Several providers may compete for the contract by submitting proposals in response to the tender; the best proposal gets the business.

The meaning of the word ‘proposal’ includes the ideas: ‘suggestion’, ‘application’, ‘tender’, ‘pitch’, ‘bid’, and ‘plan’. The purpose of a business proposal, in general, is to have a suggestion accepted and funds released for something that needs to be done.

In the engineering industry a proposal may be submitted as part of a **tender** application process. In the real estate industry, a proposal may be the lead document in a **bid** to manage a property development. An advertising company makes a sales **pitch** to gain advertising accounts. Universities rely heavily on proposal writing to obtain approval and funds for **research projects**.

Proposals contain suggestions, plans, and accurate information on the resources needed to implement them. They are documents designed to persuade decision makers who have the authority and resources to give the go-ahead for implementation.

2. PROPOSAL STRUCTURE AND FORMAT

It usually makes sense to consider the following as a guide to the structure of a proposal:

S - **s**ituation, context

P - **p**roblem, need

S - **s**olution, action

E - **e**valuation, monitoring, benefits

However, the structure and format of a proposal may vary, depending on the circumstances. Here we present a general layout which you can adapt to suit specific needs.

PROPOSAL FOR…

GUIDE TO STRUCTURE	**Sub-headings that may be used**
(Optional)	**Executive summary** Used only in formal and lengthy proposals. It sums up all sections of the proposal as a whole.
Situation, context	**Introduction** Describe the context so that it is clear why you are submitting the proposal. Within this context, identify the problem or need. If you are submitting a proposal to another organisation, include background information on your own organisation to show that you have the capacity and expertise to get the job done.
Problem and Solution	**Motivation** Give a more detailed needs analysis, showing causes of the problem, background on how the situation developed, and/or the consequences of the current situation. On this basis, state why the proposed intervention is necessary. State the objectives of the project. Describe the expected benefits.
Solution	**Implementation Plan** Describe your action plan in detail, including the time frame. If the project is complex, describe each phase or aspect under a suitable subheading, or represent the plan in a table, chart or diagram.

Solution	**Resources** This section should show what resources are available, and what is still needed. Resource categories such as human, material and infrastructure may be included, as well as projected costs in the form of a budget. Main costs should be listed in the document, with reference to more detail or the full budget attached as an annexure. In the same way, include quotations for goods and services from other providers.
Evaluation	**Conclusion** You may comment on the long-term sustainability of the project, and indicate arrangements to monitor progress and ensure quality. Propose that funding and other resources be made available to begin the project on a chosen date. Briefly re-state the benefits.
Note: As in the case of report writing, *annexures* may be attached to provide supporting detail. For our purposes you can refer to them in-text without actually attaching them to the document.	

The following examples indicate how this format can be used. The first is conveyed as a letter; the second as a memo. As a stand-alone document you could simply begin with the main heading: **PROPOSAL FOR…**

Example 1

(Letterhead)
SCADAC
(details and reference numbers)

Mr M Ramaphosa
Manager: Grants
Tshwane Municipality
(details) (date)

PROPOSAL FOR ADDITIONAL FUNDING FOR ABANDONED DOMESTIC ANIMAL CENTRES

1. Introduction and background

The Special Care of Abandoned Domestic Animals Centre (SCADAC) specialises in the care and rehabilitation of abandoned domestic animals. SCADAC has grown significantly over the past two years due to an increase in the number of abandoned animals across the Tshwane region. Consequently, more funding is requested to care for animals in disadvantaged communities.

We have had a sound ten year relationship with our communities and with the municipality, where SCADAC's documents are lodged.

2. **Objectives**

The main objective is to create sufficient capacity to accommodate five hundred abandoned animals. Currently, SCADAC's resources limit assistance to only 200 animals.

Extended facilities and additional staff members are needed. Medical supplies and equipment need to be upgraded to care for five hundred animals:

2.1 Floor space: an increase of 300 square meters is essential: See plans and three quotations (Annexures A 1 – 4).

2.2 Staff: an increase of 9 positions is necessary, from 16 – 25 members. (Human Resources report: Annexure A5)

2.3 Medical supplies for malnutrition, disease and sterilization are needed. See the list of requirements provided by the Faculty of Veterinary Science, University of Pretoria: Onderstepoort; and, three quotations (Annexures A6 – 8).

3. **Benefits of additional funding**

Health and safety of communities become more manageable when facilities are adequate. A report on district health, issued by the Department of Health, concerning tick bite fever, flea infestations and bacterial infections resulting from rotting carcasses of abandoned animals, is attached (Annexure B).

An increase in funds and resources will directly impact on the efficiency of SCADAC which will bring about a decrease in the number of abandoned animals in the Gauteng area and concomitant health threats.

4. **Plan of Action**

4.1 Floor space
The new building can be up and running within (date) from date of funding received. See Annexure C for plans and time-line provided by (contractors' names).

4.2 Staff
Staff will be recruited over a six month period starting from date of funding received (Annexure D).

4.3 Medical supplies
Priority will be given to extension of mobile sterilization facilities and emergency clinics (Annexure E).

5. **Budget**

SCADAC's budget for 2013 will *not* cover the estimated cost of increase in animal care required by our communities. Costs amount to:

5.1 Floor space: R1 million

5.2 Staff: R500 000 per annum

5.3 Medical supplies: R1 million per annum

Total funding of R2 500 000 will be required for 2013 (Annexure F).

The District Health Report 2012 (Annexure G) of the Department of Health indicates that infant mortality and children's diseases will cost the state far in excess of R2 500 000 should conditions not improve.

6. **Conclusion**

SCADAC will continue to honour its commitment to our communities who benefit in terms of physical, emotional and spiritual wellbeing when the animals in the area are cared for.

Our community training programmes in animal care and husbandry will continue. The success of these programmes has led to greater enlightenment and relief in communities (References are in Annexure H).

We will continue to comply with your administrative and legal requirements as we have done for the past ten years.

We request an increase in funding of R2 500 000 for 2013.

Yours faithfully

Anita Mongwane
Manager: SCADAC

Example 2

MEMORANDUM

To: Dennis Roman
Chair: Regional Management Committee

From: Michael Moses
Regional Director: Physical Resources

Date: 16 October 2012

PROPOSAL FOR DEVELOPMENT OF A CAFETERIA FACILITY AT THE SOUTH AFRICAN MINT (PTY) LTD

1. Introduction

The South African Mint (Pty) Ltd is investigating the benefits and costs associated with a proposed in-house cafeteria to ensure the company promotes a culture of teamwork that will generate professional services to our clients, and maximum productivity.

This proposal serves to inform the Regional Management Committee of options and factors that need to be considered to develop and maintain an in-house cafeteria.

Background

Good business requires that employees respond to clients within a reasonable time to ensure that our value proposition is maintained. However, the current records indicate that many employees are taking advantage of lunch-breaks off premises and do not return to work in accordance with their conditions of service. Client services and productivity are compromised.

The physical and psychological stress on staff and management needs to be alleviated. Security staff and managers are finding it increasingly difficult to cope with staff movement in and out of the building, as well as staff discipline. These factors are indicators of declining morale.

The rising cost of the lost productivity as well as the intangible loss of the clients' confidence is resulting in loss of sales, and this is impacting on the company's long term sustainability (Human Resources Report: Annexure A1).

Objectives and benefits

The objectives of the company are:

- Quality and reliable services
- Maximum productivity

This is aligned to the company's philosophy that requires line management and staff to demonstrate:

- Leadership
- Teamwork
- Productivity

It should be noted that Advantages and Disadvantages, below, mention intangible factors that cannot be measured reliably in the short-term. However, the negative effects on sales and service have become apparent (Sales Department: Annexures A1 and Human Resources: A2)

3.1 Advantages of in-house cafeteria

- *Improved* management
- *Improved* staff morale and teamwork
- *Improved* productivity
- *Improved* client services
- *Improved* general discipline
- *Improved* security and safety

3.2 Disadvantages of an in-house cafeteria

- A cafeteria does not form part of the company's core operations
- *Increased* maintenance and supply costs
- *Increased* legislative and regulatory requirements
- *Increased* health risk to the company

In view of the disadvantages, it is proposed that cafeteria operations be outsourced. The company will remain accountable in terms of legal requirements.

4. **Implementation plan**

A cost benefit analysis utilized a detailed resource and activity plan, spanning a period of seven months (Finance Department: Annexure B). The development of the in-house cafeteria should be managed by a project steering committee (Executive Committee: Annexure C).

The plan involves the following stages and time-line:

- ***Project planning*** will entail assembling a project team and developing a project charter and plan defining roles and responsibilities.

Proposed members: (Names)

Proposed contractors for Phase 1: (Names)

Proposed contractors for Phase 2: (Names)

Proposed contractors for Phase 3: (Names)

Date of end of Project Planning: (Date)

- ***Project execution*** will involve executing the project plan in accordance with the charter, and proactive monitoring of the budget and the project activities against pre-established goals.

Phase 1

Building of kitchen, dining room and undercover al fresco dining area.

Date of end of Building: (date)

Phase 2

Installation of moveable equipment

Date of end of installation. (date)

Phase 3

Service provider begins operations

Opening date of in-house cafeteria: (date)

- ***Project reporting*** will be on progress development of the in-house cafeteria as well as post project outcome until (date), whereafter monitoring will be managed by the Human Resources Department.

5. Budget

A Budget has been prepared on the basis of the resource and activity plan. Maintenance costs fall within budgets for (year/s:) and XYZ Bank has authorized finance for construction (Finance Department: Annexures D1 and D2).

The budget is based on two aspects: the initial construction costs; and the continued maintenance of the cafeteria.

A summary of these costs: No	Activity	Amount
1	Construction Costs (once off)	3, 654, 000
2	Maintenance Costs (annual)	1,936, 256

The costs will be covered in time (Annexure E).

6. Conclusion

The real value of establishing an in-house cafeteria will be realized in time as evident in the case histories of many organisations (Annexure F). There is no doubt that this facility has become essential in terms of safety and productivity management.

Operations can begin on (date) following acceptance of this proposal.

Kind regards

Michael Moses
RD: Physical Resources

Structural conventions such as subheadings assist the reader. The inclusion of annexures containing reports, minutes, technical details and so on, is a useful way of managing information to avoid overload for the writer and reader.

A proposal may

- be a stand-alone written document
- be a written document that leads to a presentation
- take the form of a presentation that uses various media such as posters, brochures, film, video, computer applications or physical demonstration of new equipment or technology.

3. PRESENTATIONS

Oral presentations can take a variety of forms. You may have to

- give a sales or marketing presentation to support a proposal
- defend a suggestion that you made at an informal staff meeting

- appear before a formal board of enquiry
- give a speech at a school governing board meeting
- address a conference of international experts in a certain field.

Self-image

The image you project will create an impression on your audience. You may note the following general guidelines:

- **Dress**

It is best to dress so that your appearance does not detract from what you want to present. The dress code for a financial presentation may differ somewhat from that of an advertising or marketing presentation, depending on the subject of the presentation. The former may require a conservative neutral coloured suit, whereas the latter may gain value when the dress suits the theme which may be flamboyant! Consider what will be the best style for the circumstances.

- **Confidence**

Addressing an audience makes many people nervous. Whtever the reality, a presenter needs to *appear* to be confident.

- **Body language**

Your audience will read your body language. You should therefore adopt a relaxed and confident body posture. Slouching or hunching your shoulders and chest suggests negativity whereas standing tall and straight with your shoulders back and your head held upright suggests a positive attitude that will attract your audience to pay attention to your message.

Also, to appear calm, relaxed and positive, avoid jerky and too many movements. Make hand gestures only when necessary and keep your hands from fidgeting.

- **Eye contact**

Some cultures avoid direct eye contact but in the business world direct eye contact shows positive awareness and confidence. Direct eye contact is essential when you want to engage your audience. Let your gaze rest calmly for a moment on any one audience member before you move on to another. You may Google for sources of information on this subject.

- **Voice**

  Tone: Keep your voice conversational. Avoid a monotonous level of sound.

  Volume: Ensure that everyone can hear you without discomfort.

  Pitch: Ensure your pitch is not too high which is irritating and not too low which is difficult to hear.

Speed: Nervousness leads to too fast talking so it is probably best to speak slower than your normal speed. If you are a naturally fast speaker, slow to a reasonable speed that will give your audience time to digest your words.

The idea is to give a presentation that will inspire acceptance of your proposed objectives.

Cue cards

Some speakers use cue cards (usually rectangular cards cut so that they are easy to hold) or a list of key points on a sheet of paper to remind them of what they planned to say, while maintaining contact with the audience.

Visual presentations

Plan and create your presentation in writing as you would a proposal, and then add your visual material and sound. The shorter the presentation the better, provided that all essential information is included. Visual presentation formats include flip charts, posters, brochures, slide shows, podcasts, DVDs and computer generated presentations using, for example, Micro Soft Office PowerPoint (MSOPP).

Powerpoint and comparable programs enable the user to create slide shows that can add value to oral presentations. The slides are stored in a file on the computer, mobile phone or tablet to be connected to a data projector. The images of the slides are then projected onto a screen behind or next to the speaker. This allows the speaker to maintain eye contact with the audience while changing the images with the click of a button. For information on how to create PowerPoint slides, here are a few websites that you might find useful:

http://office.microsoft.com/en-gb/powerpoint/default.aspx?ofcresset=1 http://docs.google.com/templates?type=presentations

http://www.pppst.com/

These visual aids work best if they are kept short and simple. Do not show a slide that has to be read slowly, or that has too much detail or activity, as you want your audience to focus on and communicate with you, not with the screen. Use only essential information to guide your spoken presentation.

4. CONCLUSION

In this unit we have considered general and essential aspects to do with writing proposals, and a very brief overview of presentations followed. Remember that the qualities of good business writing identified in Unit 1 of this module are relevant to documents such as reports and proposals. As you work on your drafts, ask yourself questions about these aspects of your writing:

- Clarity
- Completeness

- Conciseness
- Appropriateness
- Correctness