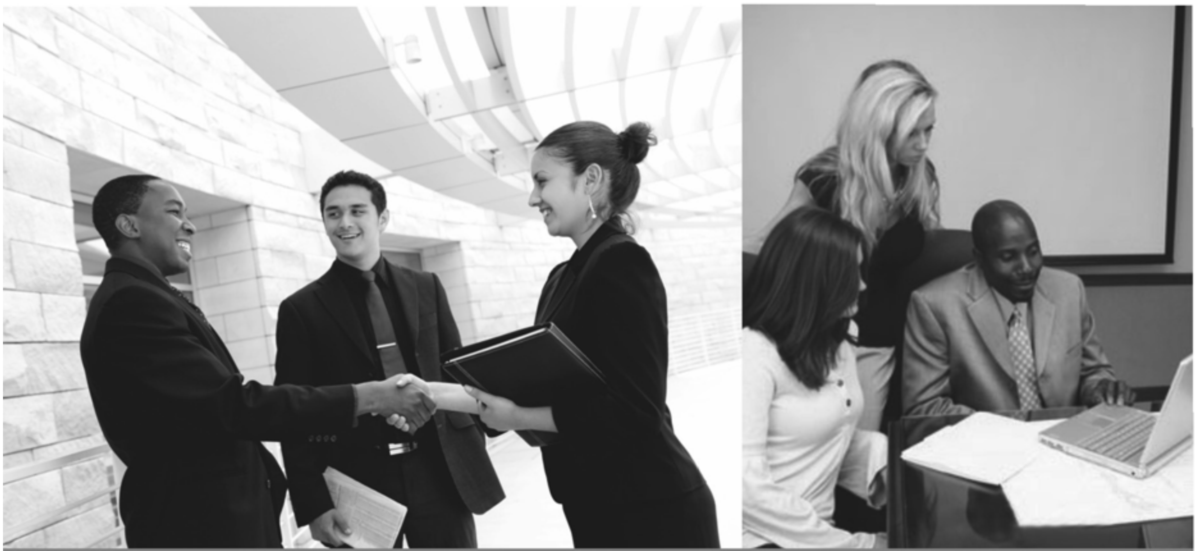

Practising Workplace English

Only study guide for

ENN1504

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Printed and published by the University of
South Africa Muckleneuk, Pretoria

ENN1504/1/2016–2018

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Study Unit 1

1. Writing Skills in Professional Correspondence

1.1. INTRODUCTION TO BUSINESS WRITING

Professional correspondence supports business productivity. Your goal is to use language successfully to support the management of operations and the accomplishment of tasks. 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.

1.2. 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

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 documents 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

- 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

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?

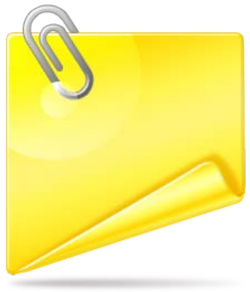
Appropriateness

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

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

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.

1.3. 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, or 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:** 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.

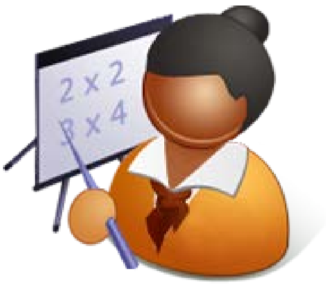
The table below shows how specific writing skills relate to the qualities of good writing that we have identified.

Assessment Criteria		
Alignment of content and structure:		
• Content: Information accuracy and completeness. • Structure (paragraphing, subheadings, format conventions).	• Appropriate writing style. • Grammar – vocabulary and sentence construction.	• Language accuracy: error free grammar; spelling; punctuation; typing /handwriting.
Writing skill:		
Revision Rework the initial planning, information collection and organisation. Where necessary, add detail or summarise.	**Editing** Improve style and sentence construction.	**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.

	**Example** Read the following draft memorandum (known informally as a “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.

Original Memorandum

MTHATHA SUPERETTE

MEMO

TO: The staff REF.: S/12

FROM: The Manager DATE: 12/10/02

STOCKTAKING

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.

Thank-you for your cooperation and hard work of which it is much appreciated.

If there is any queries about the stock taking arrangements, 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 Stocktaking.

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 format, layout, punctuation and 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 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. To some extent this has been done in the draft.

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	Edited
Thank-you for your cooperation and hard work of which it is much appreciated.	Thank you for your cooperation and hard work throughout the year.
A light lunch will be served and tea and coffee will be there.	A light lunch will be served, with tea and coffee. or A light lunch will be served. Tea and coffee will be available.
…on Saturday the 17th of October and Sunday the 18th of October from 08h00 to 6:00pm.	…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	Edited
Mthatha superette	Mthatha Superette

* (Since both 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 memorandum. 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 memorandum, you might want to identify some of the changes we have made as revision, editing or proofreading.

Edited Memorandum

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

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.

1.4. FORMS OF CORRESPONDENCE

It is important to note that choosing the form in which to correspond (memorandum, 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 used to be delivered to a postbox or to a street address by a postal service, which is why they still include postal addresses, even if they are now delivered to an email address as an attachment. Memoranda (referred to in the plural as “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 memoranda to branches of an organisation in different locations.

Email is very similar to the memorandum, but is delivered online to a computer network or internet address. Email is recent and its conventions or ‘etiquette’ (manners) are 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’.

Memoranda, 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 memorandum 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:

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
Tel.: 015 432 8795
Fax: 013 543 2278
Email: Smithson@nowhere.ch.za

138 Eland Street
Louis Trichardt
0920

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.

> *The last place name in an address is usually capitalised.*

> *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.*

138 Eland Street
Louis Trichardt
0920
12 June 2007

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

> *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".*

Dear Sir/Madam

> *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.*

ENQUIRY ABOUT A LOST COAT: FLIGHT SA 306

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.

> *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 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.

> *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

> *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

1.5. 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 advice on conventional approaches to these writing tasks, but remember that you might need to adapt what is suggested here in specific situations.

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.

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”.

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.

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.

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.

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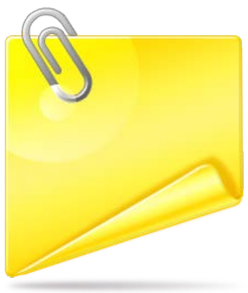
<tr>
<td></td>
<td>
Note

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.
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’.

</td>
</tr>
</table>

1.6. 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, memorandum 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

2. Meetings

2.1. NOTICE, AGENDA AND MINUTES

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.

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.

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.

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.

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.

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

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

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.

2.2. DOCUMENTATION RELATING TO MEETINGS

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. Notices contain essential information about where and when a meeting will be held, and who should attend.

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

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 subheadings.

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

	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.

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 role players, 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.

<table>
<tr><td colspan="4">Name of Organisation:
Purpose of Meeting:
Date/Time:
Chair:</td></tr>
<tr><th>Topic</th><th>Discussion</th><th>Action</th><th>Person Responsible</th></tr>
<tr><td>1.</td><td></td><td></td><td></td></tr>
<tr><td>2.</td><td></td><td></td><td></td></tr>
<tr><td>3.</td><td></td><td></td><td></td></tr>
</table>

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.

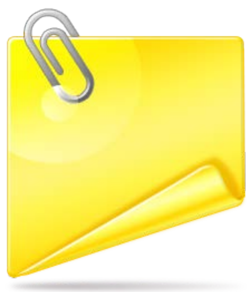
	**Important Information** Rule: If the word and the abbreviation end on the same letter, there is no full stop (Mister – Mr). If the abbreviation and the word do not end with the same letter, there is a full stop (Professor - Prof.).

- 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.

Do not use direct speech unless quoting someone	Minutes may be written as follows
Present Simple I am responsible for gathering quotes…	**Past Simple** Mr James was responsible for gathering… or Mr James said that he was responsible for gathering quotes…
Present Continuous The staff are travelling by bus…	**Past Continuous** Staff were travelling by bus...

Present Perfect Simple I have been to five meetings ...	**Past Perfect Simple** The CEO had been to five meetings... The CEO said that he had been to five meetings
Present Perfect Continuous Mr Zulu said, “The secretary has been working very hard to get the minutes out on time…”	**Past Perfect Continuous** The secretary had been working very hard to get the minutes out on time…
Past Simple I wrote the minutes.	**Past Perfect** She said that she had written the minutes. (She wrote the minutes in simple past would be correct also)
Past Continuous I was waiting for the email…	**Past Perfect Continuous** He had been waiting for the email...
Past Perfect The meeting had started when I arrived.	**Past Perfect** NO TENSE CHANGE POSSIBLE The meeting had started when Mr Mandela arrived
Past Perfect Continuous Julia Sithole said, “I had already been researching for the new product at the CSIR...”	**Past Perfect Continuous** NO TENSE CHANGE POSSIBLE Julia 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

Meeting	Minutes
Yesterday	The day before
Tomorrow	The next day
Now	Then
Last week	The week before
Last	Previous
The next	The following

- 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.

Linear Format

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

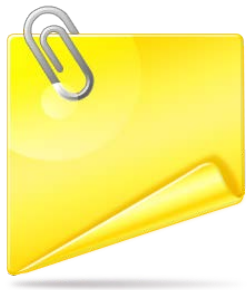
N Semunya Date:______________

Chairperson

Table Format

ESKOM Minutes of a meeting of technical staff supervisors held in the Mkondeni Boardroom on 19 July 2011 from 08:00 – 11:00			
AGENDA ITEM	**Record of discussion and actions**	**Person responsible**	**Date due**
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: The spelling of Mr Semunya's surname was corrected.	Ms Asmal	
5. Matters arising from the previous meeting			
5.1 New computers (6.1 of 14 June).	Mr Smith reported that the 20 new computers had been purchased and would be installed by 22 July 2011.	Mr Smith	22 Jul
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.	Mr Ramaphosa	31 Aug
6.2 Inefficiency in the	Ms Naidoo said that a poor technical standard was lowering productivity in the department.	Mr	Nov meeting

department	Members agreed that staff would be evaluated for further training. Mr Ramaphosa would report back on training outcome by November 2011.	Ramaphosa	
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 Aug
8. Next meeting	25 August 2011	Ms Asmal	20 Aug
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.

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.

2.4. 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

3. Report Writing

3.1. 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 reports, 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 memorandum 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.

3.2. 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:

- **Terms of Reference** – a statement of the problem to be investigated, the name/s 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.

- **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.

- **Findings** – what factual information was found when you carried out each procedure?
- **Conclusions** – discuss, comment, interpret, analyse the factual information in your Findings. (Do not suggest any action, as that comes in the next section.)
- **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.

SHORT FORMAL REPORT	MEMORANDUM REPORT
[No document header.]	(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
Title – write a short heading that indicates the problem and context, e.g. RE- PORT ON AN INVESTIGATION INTO…AT….	

<table>
<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 (Wi-Fi) 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, memoranda, 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 Department of Petroleum Affairs. This was compared with the equipment and methods of working at ESKOM where Wi-Fi 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 stand-still, 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 Wi-Fi 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 Wi-Fi 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

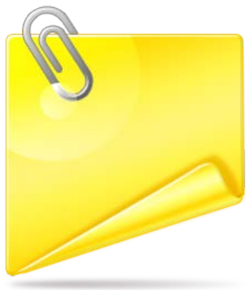
From evidence in the findings above, we can conclude that:

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

4.2 The use of Wi-Fi 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

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.

<u>Example:</u>

5. Recommendations

5.1 Wi-Fi should be installed in all buildings as soon as possible.

5.2 Members of staff should be given information and training relating to Wi-Fi 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 Wi-Fi 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:

RJ KHUMALO
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.

4.3 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 realigns 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

3.3. INCIDENT REPORT

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

Reported by: ____________________ CB No: ____________________

Date reported: ____________________ Time: ____________________

Place of incident: ________________________________

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.

3.4. 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*
    a. *Task 1 (or Phase 1)*
    b. *Task 2*
    c. *Task 3*
4. *Difficulties encountered*
5. *Next phase*
6. *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.

2. 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

3. Procedures and work completed

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

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

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

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

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

3.5 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)

4. 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).

5. Phase 2

On schedule.

6. Conclusions

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

7. 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

3.5. 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, …).

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.)

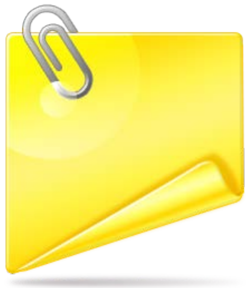
TABLE OF CONTENTS

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 …

	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.	

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

3.6. 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

4. Proposals and Presentations

4.1. 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.

4.2. 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.

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.

The following examples indicate how this format can be used. The first is conveyed as a letter; the second as a memorandum. 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.

2. Background

Good business requires that employees respond to clients within a reasonable time to ensure that our value proposition is maintained. However, the current re- cords 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).

3. 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 out-sourced. 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), where-after 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.

4.3. 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. Whatever 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 at- tract 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 Power- Point (MSOPP).

Power-point 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.

4.4. 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