INTRODUCTION

This module takes you through the process of producing a report or proposal. You will also consider shorter documents like briefing notes in this module since they are closely related. You will learn by doing rather than by reading about how to do. In this way, the structure of this module is similar to that of Module 1.

In the first section, **Prewriting**, you will begin your planning. You will determine your purpose for your document and do an in-depth analysis of its intended readers. You will develop a main message that will prepare you for the organizing and drafting phases.

With **Organizing and Drafting**, you will cover the core areas of a typical report or proposal. You will work through exercises on writing introductions, conclusions, recommendations, and summaries.

As part of the drafting section, you will consider the use of visual representations of information such as tables, charts, graphs, and images. You will revise and polish the corresponding parts of your assignment report or add visual information if it is not included in your initial draft.

The next section, **Revising**, focuses on the tasks needed to complete your document and make it ready for distribution. Finally, you will focus on **Proofreading** and apply the techniques you learned in Module 1 to a single text.

At times during the preparation of your document, you will be asked to reflect on the process that you are undertaking. This reflective process will help you work out the best way to approach future report-writing tasks.

Throughout, you will have the support of your tutor, with whom you will be required to discuss the scope and directions of your document.

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Learning outcomes

By the end of this module, you will be able to:

- **identify** key reference documents to help guide the structure and style of your report or proposal;
- **describe** the connection between proposals and reports;
- **plan** and **organize** a report or proposal by clearly stating your purpose as the writer, assessing the reader's identity and needs, and formulating the main message of your document;
- **develop** an outline that arranges your main ideas in support of your purpose and main message;
- **summarize** the main ideas of your report or proposal for use in briefing notes or speech notes so that others can convey your main message in other contexts;
- **apply** key elements of structure and style in drafting longer documents;
- **compare** strategies for conveying information with text and visually;
- **revise** documents according to standard principles of structure, style, and English-language mechanics.

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Report writing tasks

Depending on your position at WHO, you may write various types of structured documents like notes, reports, or proposals. Some of these documents, like trip or short progress reports, are relatively straightforward with a predetermined structure. Others, such as programme and evaluation reports, donor reports and proposals, are of sufficient scope and complexity to warrant a multi-step process of planning, drafting, and revising. This module focuses on a process for writing such documents in order to equip you with the strategies and skills that will help you write more efficiently and effectively.

Reports and proposals each have their unique characteristics and styles, and these characteristics and styles vary depending on the audience for the report or proposal. However, the process for writing these is largely the same. They are working documents. The sooner the reader knows the main ideas, the more useful the document is. If you keep this thought in mind, you will find the task of developing an effective document—one that does the job—much more achievable.

The purpose of this module, then, is to equip you with useful tools with which to produce effective structured documents in the future.

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Preparation: Choosing a document for your assignment

Before you begin work on this module, choose a document to work on. It should be work-related and if possible a current requirement of your job. The ideal document for an assignment has an anticipated length of somewhere between **four and ten pages**. If the document you are working on will be longer or shorter, contact your tutor to ensure the scope is appropriate.

Before proceeding, look at the assignment requirements for this module to be sure the document you are thinking of meets the assignment criteria.

You can choose to submit an entire report or proposal if it falls within the recommended length or you may decide to work on a section of it -- for example, a chapter of a longer report. Either choice will be is appropriate.

It is best if you write the document from planning through to completion as you work through this module. If your work commitments do not allow that, however, you could take a draft of an existing report or proposal as your starting point with the aim of improving its various parts and overall effectiveness.

Writing requirements at WHO vary across clusters and with document type. For this reason, this module does not focus on specific types of reports or proposals. The purpose of this module is to allow you to apply general principles of effective writing to any type of structured document. You are expected to follow the guidelines or conventions of your department or working area for the specific type of document you are writing.

Keep in mind, though, that a degree of flexibility is possible. The most important feature of your assignment for this module is that it is relevant to the work you do. Please do not hesitate to contact your tutor to discuss the document you would like to write.

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Getting started

Depending on the type of document you are writing, you may play different roles in the process. For some reports, you may be the sole author and responsible for every step; for others, you may be writing only a section of the report under the responsibility of someone else who puts the whole document together. Or perhaps you are the person who is responsible for assembling a final document, working with colleagues who are contributing sections. Whatever your role in the overall project, applying the steps of the writing process will help you do it efficiently.

In this module, you will follow through the process as though you are responsible for either the entire report or a specific section within that report (like a chapter). However, along the way we will consider some of the aspects of working collaboratively.

Report and proposal-writing involves many skills:

- determining purpose;
- analysing the audience and writing to a range of readers;
- planning, organizing and focusing;
- determining flow between parts and tying ideas together;
- writing clear, concise, appropriate and accurate text based on quantifiable data;
- selecting appropriate graphics to assist the reader;
- editing and proofreading;
- summarizing (for either actual summaries or for condensing large amounts of information into confined spaces).

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Barriers to communication

In Module 1, you considered barriers to effective communication. You will recall that there are several types of barriers: semantic, perceptual and cultural, among others. These barriers may be associated with the writer, or the reader, or with the context in which the document is being created. As the writer, perhaps you do not have a deep understanding of the subject of the entire document. The reader may have limited time to read and understand a complex topic, or there may be some reason why they will not welcome the report's recommendation or the proposal's timeline.

When you are writing just part of a longer document, there can be even more barriers. Not only do you need to consider barriers that primarily affect either the reader or the writer, you also must consider barriers related to the writing process itself. For instance, you may be collaborating with colleagues from other offices, or with individuals who approach writing in a very different way than you do.

Practice: Identify barriers

In any communication situation there are many potential barriers. Consider this scenario below, and identify some of the communications barriers associated with the writer, the readers and the situation itself. Once you have identified the barriers, click to see the ones we felt were significant.

AJ is a new employee in the Department of Chronic Diseases and Health Promotion (CHP). As one of his first tasks, he has been asked to write a funding proposal to the corporate giving office of a large American insurance company. The proposal is for a health promotion project, training primary healthcare workers in early screening techniques for visual impairments among children in three states in India. The timeline for the proposal is quite tight; it must be received in three weeks.

What communication barriers should AJ keep in mind as he develops the proposal? Remember, barriers (or communication noise) may be associated with the writer, the reader or the situation.

Click here to reveal our comments.

Reflection: Barriers to communication in your context

Before you begin working on your report or proposal, reflect on the possible barriers you might have to overcome to ensure your purpose is achieved and your main message communicated clearly. Consider your own situation, your reader's situation, and any particular challenges inherent in the report or the report-writing process itself.

Make note of these barriers. You may find it helpful to refer to your notes later, particularly when you are completing your report/proposal plan and when you are revising your report section to make it as effective as it can be.

Prewriting: The context of your document

As you get started, consider the overall context of your document. Where does it fit in among the different projects and programmes happening at WHO? Your report or proposal represents one critical moment in a continuous communication process. Proposals seek out funding and support for projects and programmes; reports inform interested readers, including donors, about the status of these activities and often recommend further projects or new directions; briefing notes help people share important information and influence strategic decisions. Very few documents exist in isolation; most are part of an ongoing conversation about a particular public health need.

In this way, your document does not stand alone. It is part of a greater effort to enlist and maintain support from partners, donors, governments, and other interested parties.

Establishing the context of your document is an important part of prewriting. Identifying and reviewing relevant documents such as terms of reference, guidelines and templates is an important part of the process. Establishing a checklist for document completion and a timeline for the project can help you keep the project on track.

Guidelines, terms of reference

Your office has resources to help you with your writing tasks. Some may be broad guidelines or style manuals that apply to a range of documents and publications; others are much more specific and will apply directly to the type of document, or the specific document, you will be writing. Still other external resources, like the *Oxford Dictionary* or the *Chicago Manual of Style*, are useful to have no matter what kind of writing you do.

Use these resource documents. They provide far more specific guidance and direction than this course can.

Remember, too, that your document is part of a conversation. Before you begin writing, find the rest of that conversation: the earlier project reports, funding proposals and other documents that have carried the project or programme to the point where it is now.

You will have to find the specific sources you need yourself, but do have a look at the following list of resources. The *WHO Style Guide* is available on your intranet.

General Guidelines	Specific Writing Guidelines
• *WHO Style Guide*	• Bulletin of the World Health Organization • Monitoring and Evaluation Plan Guidelines (Guidelines for submission of an M&E plan for Global Fund grants) • SEARO's Guidelines for writing proposals • WHO and UNAIDS resource kit for writing Global Fund HIV proposals • Bloomberg Initiative To Reduce Tobacco Use grants program • Global Health Grant from the Gates Foundation

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Preparation: Guidelines, terms of reference

Once you have decided what type of document you are going to develop for your Module 3 assignment, your first task is to assemble all guidelines, templates, terms of reference and other documents you need. Consult with colleagues in your department, and your supervisor, to determine which are the applicable resources for your writing project. Remember to look for specific documents as well as guidelines; for example, you will need to refer to the original proposal if you are writing a project report, or the letter of intent if you are writing a proposal. Identifying these resources at the prewriting stage will save you time and effort.

Document your list of resources and include it with your report as part of your assignment. You can download a blank resource list to fill in by clicking here. Submit your completed list of guidelines and terms of reference to your tutor as one component of Part A of the assignment for this module.

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Scheduling your project

Developing a timeline for completing the document you are working with is not technically part of writing; it is, however, critically important for successful development of reports and proposals at WHO. In most cases, you will not be completing an entire document independently. Sometimes you may be collaborating extensively with others, and your document timeline may include group meetings and ongoing consultation and review. Other times the collaboration will be less extensive; for example, you will want to consult with finance staff when you are costing a proposal, and may need to consult with others who have written successful proposals to the same donor. All these consultations take time.

Develop a timeline for completion as part of the prewriting stage. You likely already know when the document must be completed. Work backwards in time to find out when you will need to consult with colleagues. Once you know, you can let them know realistic deadlines for their own part of the project. Develop your timeline with enough flexibility to allow for unforeseen delays.

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Preparation: Develop a timeline

Record the timeline for your project. You may follow the example, or use a format that you prefer. You will submit this timeline to your tutor as one component of Part A of the assignment for this module. If you are completing a document especially for this course and are not facing any other deadlines, refer to your Key Dates document as a basis for scheduling.

Note that you are asked to record:

- your start date
- the due date
- major tasks to complete

Here is a sample to guide you in completion of your timeline.

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The purpose of your report

As you discovered in the first module, the purpose serves to answer the question “why?” about your document. Why are you writing this report or proposal? Let’s recall a few of the quotes from Module 1 about what effective writing means. These quotes address the importance of purpose:

- Effective writers have clear objectives. They link their activities to impact.
- You have to know your audience when you write.
- The issues with good writing are getting to the point and knowing your audience.

These quotes illustrate why identifying the purpose is the first step in report writing. The purpose speaks directly to the reader’s needs in reading your report – that is, what they the reader needs to do as a result of reading your report. Moreover, your purpose informs all the other aspects of the report, including tone, structure, and scope.

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Considering your readers and determining your purpose

When you plan your report, you must consider your reader: the person you hope will act on the basis of your report. Again, you need to ask an obvious question: who is my reader? It is most likely that you will have multiple readers for your writing. Some (like your immediate supervisor or a funder) will be primary readers, and others will be secondary readers, but you still need to keep them in mind. It is also useful to identify the key decision-maker among your readers. For example, if action is to be taken, ask yourself, “Who can authorize the action I want taken?”

- **For proposals**, this may be the person or persons who can approve the idea, supply the funds, or both.
- **For donor reports**, this may be the representatives of the donor organization.
- **For country programme and regional reports**, this may be the Country Representative, senior regional or HQ staff, or authorities such as the Executive Board.

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Your purpose and the expected actions of readers

In Module 1, you considered the importance of purpose – that is, what you hope to achieve by writing your document. Along with this, you also considered the response you expect of your reader as a result of reading your report or proposal. These two concepts – writer's intentions and readers' expectations – are central to the planning process.

Your purpose	Expectations of your readers
What do you want to do with your report or proposal?	What do you want your reader to do as a result of reading your report?
Examples	**Examples**
○ Seek approval ○ Seek funding ○ Recommend ○ Assess ○ Describe expectations ○ Provide guidelines	○ Approve ○ Provide ○ Accept and implement recommendations ○ Take action ○ Follow instructions in carrying out an action

In order to achieve your purpose, your document will need to provide the readers with sufficient evidence to support the action you expect them to take. For instance, if you are writing to seek approval for a project, your report will have to provide evidence that the goals of the project are worthy, and that it is well planned and likely to succeed in its goals.

Look at the following document types and consider what you would hope to achieve from your readers with each of them:

Type of Report	Your purpose	Intended reader response (As a result of reading the document, my readers will...)
Proposal	Click here for comments.	Click here for comments.
Donor report	Click here for comments.	Click here for comments.
Concept note	Click here for comments.	Click here for comments.
Terms of reference	Click here for comments.	Click here for comments.
Guidelines	Click here for comments.	Click here for comments.
Performance evaluations	Click here for comments.	Click here for comments.
Work plans	Click here for comments.	Click here for comments.

Preparation: Purpose

We have been examining the purpose of documents and expectations of our readers. Now, write the purpose statement for your document. Write the purpose in a way that suggests the type of action the reader will take as a result of reading the document. Begin with this phrase:

When my primary reader reads this document, he/she will…

If you are writing part of a report or proposal rather than the entire document, we suggest you first write a general purpose statement for the document itself, then a more specific statement indicating the purpose of your section of it.

You will submit your purpose statement to your tutor as part of your assignment and it forms one of the components of your Report/Proposal Planning Document. You will be completing other components of this planning document as you work through this module, so keep it handy.

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Reader expectations

Writing is difficult when you are unsure about who is reading your document. The more you know about your readers, the better chance you have of helping them understand and accept your message. Knowing your reader strengthens your position as the writer of a document. When thinking about your reader, it's important to keep in mind:

- your reader's familiarity with the subject matter and with the work of WHO—their background knowledge;
- any possible reasons your reader may not accept your message (This may include barriers such as time and budget; it may also include differences in belief or values);
- what your reader really needs from the document.

For example, in the case of donor reports, a typical reader expectation will be to determine how WHO's programme has made a difference in the lives of individuals. The readers in this case will want to read about the impact of the programme, and they need to know how their contribution has helped. They do not want to read all about how many computers were purchased or how much fuel was consumed in the course of the programme; what they will be interested in is the programme's impact, rather than its process.

One way to increase your awareness of your readers and their needs is to conduct a **Reader Analysis**. You have already considered the value of a reader analysis in Module 1. Now, you have a chance to apply this analysis to the report you are working on.

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Preparation: Reader analysis

You will remember that in Module 1, you considered both primary and secondary readers for documents. Your report or proposal is likely to be read by a number of different readers, both primary and secondary. Although your focus should be on your primary readers and the key decision-maker, it is wise to keep other readers in mind.

This reader analysis form provides a structured way for you to reflect on the needs of your primary and secondary readers, and the potential barriers that might prevent them from accepting your main message.

Your reader analysis is a major component of your **Report/Proposal Planning Document**. You have already included your purpose statement in this document. Complete the reader analysis component of this planning document now.

You will notice there is a place on the form for you to record your report's main message, but you will do that later. So keep this document on hand as you continue through the module.

This planning document is part of your assignment (Part A). You will submit it to your tutor for feedback once you have completed the Organizing section of this module.

> *Note: Please do not include your tutor as a reader in the reader analysis. Your tutor's role is different from that of other readers; he or she is there to coach you, not to be persuaded by your message.*

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Main message

Your purpose statement leads naturally into your report's main message. Unlike the purpose statement, your main message is not just a planning component. You will also include it in your draft as an essential part of your text.

In not more than a couple of sentences, your main message forms the main idea that you wish to convey in your report or proposal. By establishing a clear main message, you have created for yourself a reference point for your entire document. With a clear main message you will be able to assess how focused your writing is and whether it is organized to help achieve your purpose.

Examples of main messages

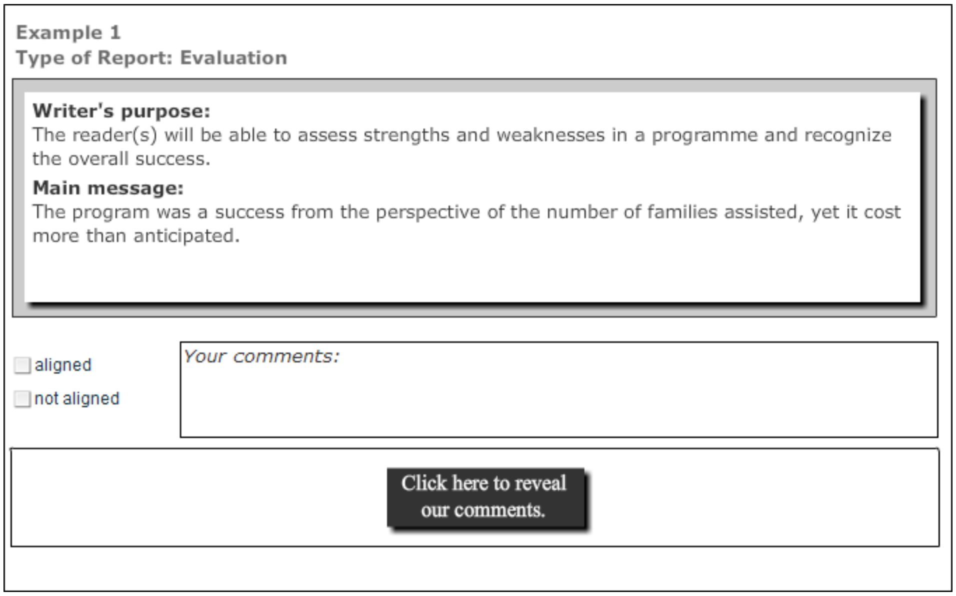
Please note that it is not possible to compose a generic main message that can apply to a particular type of report such as a proposal or an evaluation. The main message must contain specific details that will help determine the logical organization of information in your report. Therefore, in the table, you will see more specific main messages as examples of the kinds of main message that would appear for these types of reports.

Donor Report	
Purpose	As a result of reading this donor report, my reader(s) will: recognize the quality of work performed by WHO's country office and will be supportive of continued work from the funding provided.
Primary reader	Donor representatives
Main message	During the period under review, WHO not only built up the capacity of health partners to prepare and respond to emerging public health threats, but also ensured coverage of health services for vulnerable and conflict-affected people.
Proposal	
Purpose	As a result of reading this proposal, my reader(s) will: approve funding for a capacity-building initiative for HIV/AIDS training and knowledge management strategies in conjunction with the HIV and AIDS prevention project across the country.
Primary reader	Funder, manager, decision maker
Main message	The donor partner should accept this proposal for funding because its objectives are in line with those of the HIV and AIDS prevention project. The funding proposed would help build local capacity for HIV/AIDS training and strengthen health sector knowledge management by improving hospital databases.
Terms of reference	
Purpose	As a result of reading these terms of reference, my reader(s) will prepare work tasks to fulfill the demands of the project.
Primary reader	Working group
Main message	The Working Group (WG) will serve as an advisory body to the Roll Back Malaria (RBM) Partnership Board with the following objectives: ○ enhance the RBM partnership's capacity to mobilize new resources for country malaria control actions, including prevention; ○ ensure the effective utilization of available financial allocations. Members of the WG will also review financial flows data used by the RBM Partnership for advocacy or international reporting.
Procedure document / How-to	
Purpose	As a result of reading these guidelines, my reader(s) will: develop an appropriate Office Management Plan (OMP).
Primary reader	Users of the guidelines (Regional and division directors, those who are writing the plan)
Main message	In its now simplified form and within 10 pages, the OMP will highlight, in a succinct manner, key division and office functions, expected results and key performance indicators, analysis of resource needs and monitoring and review mechanisms.

Practice: Main message

Since the purpose and main message form the foundation of your report or proposal, they must be carefully aligned. When they are not in alignment, it is easy to write something that is confusing for the reader. For example, if a proposal suggests a new programme for malaria reduction, and the main message states, “The XYZ programme was effective in reducing malaria rates by over 25% last year,” the reader may be confused. The report content might seem to lack direction, focusing sometimes on the previous programme, and other times on the proposed new programme. A main message more clearly in alignment with the purpose might say, “Based on the successful strategies of the XYZ programme, a new programme will contribute to malaria reduction.” The main message would help the writer plan the report, and help the reader read it.

In each of the examples, decide if the purpose and main message are aligned. Then click the link to see our response.


Example 1
Type of Report: Evaluation

Writer's purpose:
The reader(s) will be able to assess strengths and weaknesses in a programme and recognize the overall success.

Main message:
The program was a success from the perspective of the number of families assisted, yet it cost more than anticipated.

☐ aligned
☐ not aligned

Your comments:

Click here to reveal our comments.

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Preparation: Main message

You are now ready to complete the initial planning for your report by identifying the main message of your report or report section. You will submit this main message to your tutor as part of your assignment.

In your Report/Proposal Planning Document, you should have already completed your **Purpose Statement** and your **Reader Analysis**. It is now time to include the main message as part of your planning.

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Proposals: Writing project goals and objectives

When you are planning a proposal, one of your first tasks will be to refine your project goals. Donors generally do not provide funding for ongoing research or operating expenses where no clear connection can be shown between the work to be completed and the advancement of public health. Goals are a critical feature of a proposal since they reveal this connection to donors. They are important to projects even after the proposal has been funded; project goals are central to subsequent documentation on a project such as status and evaluation reports. So it is important that you write goals that are achievable as well as significant from the perspective of donors.

A helpful way to develop your goals is by ensuring that they are specific, measurable, achievable, relevant, and time-bound: SMART. Well written, SMART goals or objectives form the core of your proposal and of the project you are proposing. When you are writing a proposal, your first step is often a shorter document: a concept paper, for example, or a Letter of Intent. These documents are very brief, often not more than one or two pages. In such a limited space, you need to get straight to the point of your proposal, and you can do this by writing SMART goals.

Much more can be written about the importance of goals and objectives, and of linking those objectives to measurable project results. If your work involves much of this type of writing, it will be valuable for you to become familiar with the Logical Framework (LogFrame) approach to objectives-oriented planning. There are many online references for this approach. One valuable one is *Logical Framework Approach: handbook for objectives-oriented planning*, published by the Norwegian Agency for Development Cooperation and available at:

http://www.norad.no/en/Tools+and+publications/Publications/Publication+Page?key=109408

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Practice: Compare project goals

In many cases, the idea of a project is sound; it is something that, if completed, will improve public health in a particular part of the world, or for a particular population. It can be challenging, though, to write project goals that convince donors of the value of a project.

Each of the goals below can be improved: expressed in ways that are more specific, measurable, achievable, relevant or time-bound. How would you refine each goal statement? Once you have made a revision, or identified the information that would be needed to complete the revision, check our comments.

Here is an example:

Example 1

Original goal:
Conduct a workshop on oral healthcare for early childhood educators.

Goal evaluation: *This goal statement is specific, measurable and achievable, and can be made time-bound with the addition of a deadline. However, the relevance of the goal to improved public health is not obvious.*

Suggested revision:

Early childhood educators will include oral healthcare content in their curriculum; screening programs for children's oral health will note a measurable decrease in cavities in young children within three years.

next example ▶

ORGANIZING

Already at this stage in the process, you have completed three important planning tasks:

- determining your purpose;
- analysing the report's targeted readers;
- composing your main message.

Now you need to get down to the task of organizing. This involves establishing your main points, which will become the major headings in an outline. Once you have your outline, you will be able to begin drafting the sections of your report.

Have a look at the following four examples of report outlines. You should be able to notice immediately the different organizing strategies and formats the writers have employed in each case.

Example 1: Long report

SECTION 1: INTRODUCTION

SECTION 2: GEOGRAPHY, DEMOGRAPHY, SOCIAL, POLITICAL AND ECONOMIC CONTEXT
2.1 GEOGRAPHY AND DEMOGRAPHY
2.2 SOCIAL CONTEXT
2.3 POLITICAL CONTEXT
2.4 ECONOMIC CONTEXT

SECTION 3: NATIONAL POLICY ENVIRONMENT AND RESOURCES
3.1 NATIONAL GOALS, OBJECTIVES AND STRATEGIES, AND THEIR LINKAGES TO THE HEALTH SECTOR
3.2 NATIONAL HEALTH POLICY ENVIRONMENT
3.3 HEALTH CARE SYSTEM IN NAMIBIA
3.4 FINANCIAL ALLOCATIONS BY GOVERNMENT AND KEY DEVELOPMENT PARTNERS

SECTION 4: WHO'S STRATEGIC FRAMEWORK
4.1 WHO'S MANDATE AND PRIORITY SUPPORT AREAS
4.2 WHO COUNTRY COOPERATION STRATEGY FOR NAMIBIA

SECTION 5: PROGRESS IN 2009
5.1 MANAGING FOR RESULTS: HEALTH SYSTEMS STRENGTHENING
5.2 MATERNAL, NEWBORN AND CHILD HEALTH
5.3 BLOOD TRANSFUSION
5.4 MAJOR COMMUNICABLE DISEASES
5.5 NON-COMMUNICABLE DISEASES
5.6 EMERGENCY PREPAREDNESS AND RESPONSE
5.7 CROSS-BORDER COLLABORATION
5.8 ADVOCACY, PARTNERSHIP BUILDING AND INFORMATION SHARING
5.9 STAFF DEVELOPMENT AND TEAM BUILDING

SECTION 6: CONCLUSION

This is an example of a highly structured longer report, in this case a country's annual report. You can expect a report like this to be long with specific sections throughout to cover the work of the country office's variety of activities.

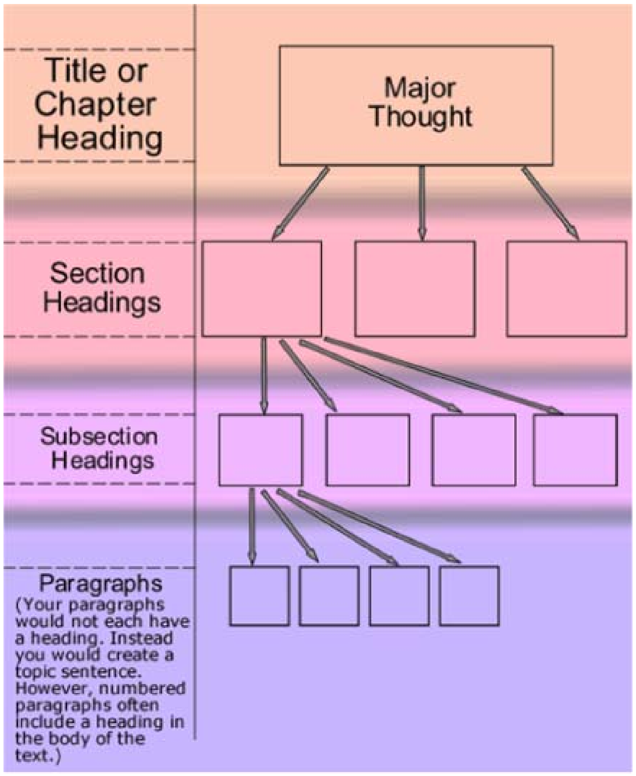
Each of these sections is five to ten pages in length; they are essentially independent reports within the larger document.

next example ▶

Hierarchy of ideas and outlining

In some of your work, you will begin with a predetermined outline that includes the major sections of the report. This can be helpful, but you will still need to organize the information you have within those major headings. A more detailed outline will serve your purposes for organizing in this case. If you do not have a predetermined structure, you will have to create your outline on your own. In both cases, the process is the same. You need to identify your main ideas and sub ideas and arrange them in a logical order that serves your purpose and ultimately supports your main message. A good outline offers the following advantages for your report:

- An outline will help you to organize your ideas more thoughtfully, with a view to categorizing and subdividing the main ideas of the report;
- writing to an outline lets you focus on one section at a time and avoids the feeling of becoming overwhelmed with too much factual information. One of your goals in planning a report is to make some sense of all the information you have gathered and to arrange that information in a way that is going to have an impact on your readers. The outline can help achieve this goal and provide you with a way to work on your writing in smaller more manageable sections;
- organizing your document often means deciding not to include some of the information you discovered in your research. Remember, your readers don't care about the process you went through to get to your recommendations or conclusions. They definitely do want to know that your ideas make sense. The readers want a clear, concise end-product, together with evidence of adequate information and logical thought processes.



Headings

Your outline is important in helping you establish the headings and subheadings of your report. These headings will alert your readers to the content that follows. Readers should be able to skim the headings of your report—either in the report itself or by reviewing the table of contents—to get a sense of its structure. To make the most of this technique, you should ensure that each of your headings represents a single, defined grouping of content.

First-level headings are a summarized list of your main points. In some types of reports, these headings are pre-determined. Often, though, your headings will be substantive, providing your reader with a map of your report's contents. How do you arrive at these main points? There are a number of ways, and they are all about distilling the essence of what you want to communicate.

When developing your headings, keep the following aspects in mind to make your headings as consistent as possible:

- **Consistency in format**. If you decide to use a particular grammatical style to form your headings, you should stick with that style. In the example, all the headings are presented in their noun form.
- **Consistency in importance**. The information in a certain level heading should be of equal weight or importance as the other headings in that level. In the example, reducing the risk of emerging diseases and strengthening early detection of outbreaks are given the same weight of significance.
- **Consistency in hierarchy**. The information in your main headings should be more general than that of your subheadings. In the example, the main headings relate to emerging diseases and detection of outbreaks in general. The subheadings refer to more specific diseases and surveillance processes.

Example

Country implementation planning

Identification of gaps in capacity to fulfil the Strategy's objectives

Implementation planning

Objective 1 - Reduce the risk of emerging diseases

ER1 Reduced risk of emerging diseases through strategic communication and community participation

ER2 Reduced risk of diseases acquired from animals

ER3 Reduced risk of acquiring infections from health care

ER4 Reduced risk of laboratory-acquired infections

ER5 Strengthened containment of antimicrobial resistance

Objective 2 - Strengthen early detection of outbreaks of emerging diseases

ER1 Strengthened early warning systems

ER2 Coordinated and integrated surveillance systems

ER3 Established and strengthened public health functions of laboratories

ER4 Strengthened local capacity for surveillance and risk assessment

ER5 Strengthened information management for early detection of emerging diseases

Practice: Headings

Evaluate the headings from this sample table of contents. Remember to watch for:

- Consistency in format
- Consistency in importance
- Consistency in hierarchy

Once you have reviewed the table of contents, move your mouse over the table to see our comments.

This table of contents is for a short report on the importance of quality in data used in grant applications.

Title: Quality of data used in grant applications: concerns and solutions

Introduction
- Purpose
- Scope

Overview of grant application quality issues and their causes
- Completeness
- Lack of timeliness
- Accuracy
- Lack of consistency

Issues and risks posed by poor data quality
- Disbursement decision-making
- Implement progammes
- External reporting and resource mobilization

Impact on other projects
- Reputational risks

Potential solutions
- Improvement of IT systems and tools
- Development of standards for content
- Training and ongoing support for data entry staff

Conclusion/Decision points

Preparation: Hierarchy of ideas and outlining

Now that you have had a chance to practise some of the ideas around organization, put them into action.

Using the ideas and strategies in this section, produce an outline for your report. You will need to consider your purpose and readership, the hierarchy of ideas, and the pattern of organization you will adopt.

Use this outline to refine the headings for your report. As you do so, keep in mind the features of effective headings. In particular, make sure that your headings have the following characteristics:

- Consistency in format
- Consistency in importance
- Consistency in hierarchy

Note: *Microsoft Word has an outlining tool that you can use to help with this process. By using it, you are also able to generate an automatic Table of Contents. This will save you a lot of time in formatting and referencing page numbers. Even if you don't use the outlining tool, you can still use Word's automated Table of Contents feature. If you are unfamiliar with the outlining tool in Word or the automated Table of Contents, try looking them up in Word's internal Help menu. They are relatively easy to use and can save you time in the long run, especially if your report undergoes substantial revisions.*

ASSIGNMENT PART A: Prewriting and organizing tasks

Now that you have completed the pre-writing and organizing parts of the writing process, it is time for you to submit the first part of your module assignment to your tutor.

Submit the required documents for Part A now.

While you wait for your tutor's feedback, continue working through the rest of the module. Your tutor may suggest that you reorganize parts of your report, or consider some barriers to understanding that you have not thought of in the reader analysis. You will be able to address this feedback and incorporate your tutor's suggestions when you are revising your report.

> ***Note:*** *Please check Part A of the assignment instructions for the documents you need to submit at this stage. Also, if you haven't completed the preparation activities to this point, go back and review them. They will also help you complete this part of the assignment.*

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DRAFTING

If you have developed your outline in sufficient detail, you might be able to see all your main ideas expressed all the way down to the paragraph level. At the very least, the structure of your report should be clear. Your job now is to compose your paragraphs so that your reader will be able to understand all the information used to support your main message. Before you get started, remember these points:

Don't skip the crucial steps. Don't expect to be able to write a final version of your report without preliminary work. If your timeline is desperate, it is especially important to determine your purpose and main message, consider your reader and develop an outline. These steps help you create a report quickly and efficiently, and help others contributing to the document understand what is needed.

Control your writing sessions. When possible, plan to write at least one draft of the entire document and be prepared to rewrite critical sections several times before you are satisfied. Try to write in uninterrupted chunks of time. If time permits, wait at least two days after completing the first draft before you begin editing and rewriting.

Use headings. Headings are not just useful in creating your outline. In work-related writing, headings almost always improve the report's readability and usefulness.

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Drafting techniques

The transition from planning to drafting can be challenging. Writers who find themselves stuck are sometimes in the awkward position of knowing what they want to say, but not knowing how. Your task in writing a draft is to get the words down on the page. It is much easier to revise a first draft than it is to write it in the first place. Write your draft as quickly as possible. Do not concern yourself with the finer points of style and mechanics. You will have time to work on those aspects of your draft later (and this will be the focus of the latter part of this module). Trying to get it all perfect the first time is the surest way of developing a case of writer's block. Following are a few suggestions for how to get started.

Work with structure

Narrow your structure down to the main idea of each paragraph. You can do this by working with the headings and subheadings you have already identified, and refining them further. By the time you get down to this paragraph level, you will have a much clearer idea of what you want to say and in what order you want to say it. Once you know that, develop each of the main ideas into a paragraph.

Avoid writer's block

Write the sections that are easiest first; then, write the more challenging ones. Sometimes it can be difficult to start at the very beginning and work your way to the end. That is how you want your reader to go through your report or proposal, but it doesn't mean you have to write that way. Similarly, if you are working on one section and you become stuck, move on to another one. You will spend your time more productively when you are actively writing rather than struggling to start or finish a section.

In this part of the module, we focus on the body of the report or proposal you are writing. Although there are some differences between reports and proposals, both rely on clearly-written paragraphs and logical flow of information to be successful. There are some elements that apply mostly to reports or proposals, not both, and we have identified those. Later on in the module, you will look at drafting and revising specific components of the document, such as the introduction, conclusion, recommendations, and summaries.

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The human factor – “The reason we do our work.”

From a WHO staff member on the importance of the human factor:

> “When we went to negotiate for the second phase, we had a short video – children with helmets. It's 5% of the project, but it's the human face – the donor needs sound bites, needs to see the ‘bang for their buck’. The rest of the project is us slaving away getting trauma care, ambulance transport ... ”

This is a good example of the balance between highly visible, quick wins and long-term, underlying work.

Even when you are appealing to something that seems as impersonal as a large foundation, you need to remember to appeal to the human side of the decision-makers. This can involve learning specifically about the individuals involved. It’s part of analysing your readers. Donors want to know that their funding is being used to save lives, improve living conditions, and provide children and families with better health.

Following are some points to remember when including human interest stories with your report:

- always ensure the dignity of the subject you are telling your story about;
- ensure that the individual portrayed in the story agrees that his/her story be told and his/her photos be published;
- ensure that your facts and figures are correct and accurate.

A very compelling example of this approach is the WHO publication called *Faces behind the figures: Voices of road traffic crash victims and their families*. This is an entire document that looks at the issue of road safety from the point of view of those who have suffered from road traffic accidents. The book uses human interest stories very effectively to argue for greater advocacy around improved road safety policies. It does not tell these harrowing stories without a purpose. Interspersed with the stories are various facts around road safety, resulting in a great feeling of sympathy for the victims in addition to a greater awareness of the issue. Strategically, the book has a targeted readership: “The book can be used by road traffic crash victims, family members, nongovernmental organizations, governmental agencies and international organisations to raise awareness of the problem of road traffic crashes.”

Practice: Human factor

Many reports can be enhanced with human interest stories. Consider the three reports described here. Could they be enhanced by the inclusion of a human interest component? Once you’ve considered each one, click to see our comments.

Example 1:
Active aging: Towards age-friendly primary health care

This lengthy report introduces the significance of age-friendly primary healthcare for elders worldwide, and discusses major issues for the provision of services. http://whqlibdoc.who.int/publications/2004/9241592184.pdf

Click here to reveal our comments.

Example 2:
20 ways the World Health Organization helps countries reach the Millennium Development Goals

This four-page, point-form document identifies broad actions WHO has taken to help achieve the MDGs. For example, “... increase access to safe, effective, quality medicine and diagnostics.” http://www.who.int/topics/millennium_development_goals/20ways_mdgs_20100517_en.pdf

Click here to reveal our comments.

Example 3:
World report on child injury prevention

This joint UNICEF/WHO report provides an overview of child injuries worldwide, and contains one chapter on each of several major causes of injury. http://whqlibdoc.who.int/publications/2008/9789241563574_eng.pdf

Click here to reveal our comments.

Drafting findings

Some major research reports have a section called findings, which form the greater part of a report's body. Findings are not the same as a conclusion. Findings summarize the results of a survey, or outcomes of a research study or other data gathering. They are factual and, unlike a conclusion, do not contain observations or opinions drawn from the results. This allows the reader to look at the data objectively without the writer's interpretation. The following extracts demonstrate the difference between findings and conclusions in the same report.

Findings	Conclusions
The principal findings of the evaluation were as follows: ○ The programme is coordinated by AAHI, with two national coordinators, Dr Xxx Xxxxxxx and Dr Yyy Yyyyyyy. The programme is well organized and builds on the strengths of the AAHI, the health infrastructure and the University of Buenos Aires. A full-time programme secretary has been appointed, with funding from LUSIDA, but both national coordinators work in a part-time, unpaid capacity, despite devoting a considerable amount of time to the programme. ○ A national Executive Committee is responsible for the planning and implementation of the programme. The Committee comprises the two national coordinators and two representatives of the Argentinean Association of Technicians in Haemotherapy and Immunohaematology. ○ A national Development Committee has also been established to assist in the development of the programme: membership includes representatives of the Ministry of Health, LUSIDA, experts in HIV/AIDS and X. Xxxxx, and an expert in distance education from the University of Buenos Aires ...	○ The findings of the evaluation exceeded the expectations of the WHO consultants. They confirmed the success of the distance learning programme in blood safety in Argentina, which provides an excellent model for other countries wishing to establish similar programmes. ○ There has been an improvement in individuals' knowledge and understanding in all subject areas covered by the WHO distance learning materials. More importantly, this is reflected in significant improvements in services as a direct result of the programme. The impact of the programme varies according to the level of the health system, with small centres showing dramatic improvements in individual performance and in the strengthening of services. Nevertheless, even the most sophisticated centres reported positive changes in attitudes and performance. The impact extends beyond blood transfusion services, particularly in the area of biosafety. The medical director of the small district hospital in Tilcara, Jujuy Province, for example, reported that the work undertaken by participants in the programme had directly stimulated the introduction of biosafety procedures throughout the entire hospital. ○ The positive outcomes of the programme were evident in a short period of time. Fundamental changes in practise were reported in all the centres visited, even where participants had not yet completed the programme.

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Preparation: Draft the body of your report or proposal

Using your outline as a guide, draft the body of your report or proposal now.

Do not feel that you must prepare the introduction, conclusion, recommendations or executive summary as part of this initial draft. In general, it is easier to begin with the body of the report and draft the other sections once the initial draft is complete.

Do not try to make this draft perfect. A first draft is just that—a first draft. Your goal is to get your ideas down on paper, supporting your main message by following the outline you have already prepared. You will have time to revise and proofread your work later.

Professional writers know it is much easier to revise than it is to begin with a blank page. Right now, your task is just to produce something for later revision.

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Report introduction

When readers make time to read your report, they are likely to be squeezing this reading into a busy day filled with other tasks. They will want answers to a number of questions very quickly, such as:

- Why have you written this document?
- Why have they received it now?
- What is your main point?

In general, your introduction should strive to answer these questions. If you don't supply the answers, you run the risk of losing your readers' attention before they have really begun.

Why do readers need introductions? The English author, C.S. Lewis explained:

> *"I sometimes think that writing is like driving sheep down a road. If there is any gate to the left or right, the reader will certainly go through it."*

A clear introduction closes the gates, and helps the reader move smoothly through the report.

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Purpose of the report introduction

The best way to learn about writing introductions is to study good examples. The document, *Human Rights, Health and Poverty Reduction Strategies*, provides such an example:

Human Rights, Health and Poverty Reduction Strategies

An introduction is a contract between you, the writer, and your readers. In it, you make specific commitments that must be fulfilled. The most important of these is your statement about the purpose or focus of your report.

Introductions in reports have three main functions:

- making the purpose of the document clear
- explaining the scope of the document (This is sometimes called stating the Terms of Reference.)
- preparing the reader for the contents, giving a framework on which to build understanding of the document and sometimes providing a roadmap to the content.

Their lesser but still important functions are:

- gaining the reader's attention
- providing some background information
- indicating the authority under which the document is written.

In short, your introduction should provide your readers with whatever they need to prepare them to understand the information in your report or proposal.

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Practice: Report introduction

Look at this abridged version of the introduction to the *2008 World Report on Child Injury Prevention*. Label the section with the function it performs. Note that some sections may perform more than one function; choose the one you think is most significant.

We have used excerpts from the introduction to save you reading time. If you wish to read the whole introduction, the document is available by clicking on the link below. The document is 232 pages long and may take some time to load on your computer.

http://whqlibdoc.who.int/publications/2008/9789241563574_eng.pdf

Excerpt

Child injuries are a growing global public health problem. They are a significant area of concern from the age of one year, and progressively contribute more to overall rates of death until children reach adulthood. [text omitted]
In 2005, WHO and UNICEF issued a call for a greatly expanded global effort to prevent child injury. This was followed in 2006 by WHO's ten-year plan of action on child injury. The plan listed objectives, activities and expected outcomes on child injury and covered the fields of data, research, prevention, services, capacity building and advocacy. [text omitted]

Choose a function:

This joint WHO/UNICEF World report on child injury prevention brings together all that is currently known about the various types of child injuries and how to prevent them. [text omitted]

Choose a function:

The World report on child injury prevention is directed at researchers, public health specialists, practitioners and academics. A summary of the report containing the main messages and recommendations and a set of fact sheets are available for policy-makers and development agencies. A version aimed at children – to create awareness and provide children with a sense of ownership of the issues – and a set of posters have also been produced.

Choose a function:

Aims

The overall aims of the report are:

- to raise awareness about the magnitude, risk factors and impacts of child injuries globally;
- [additional aims omitted]

Choose a function:

Definition of childhood

There is no universally agreed age range for what constitutes childhood – [text omitted]

Choose a function:

Scope of the report

The United Nations Secretary-General's Study on Violence against Children and the accompanying World report on violence against children provided an in-depth review of intentional injuries to children (see box on the UN Secretary-General's study). In addition, the World report on violence and health, published by WHO in 2002, included chapters on child abuse, youth violence and sexual violence. This report examines the five most common unintentional (or "accidental") child injuries. [text omitted]

Choose a function:

This World report on child injury prevention consists of seven main chapters. Chapter 1 places child injuries in the context of other health concerns and related global issues.... [remaining chapters described]

Choose a function:

Process

The development of this report was led by an Advisory Committee and an Editorial Board and has taken place over three years. Based on outlines… [four-paragraph description of report-writing process]

Choose a function:

Moving forward

This comprehensive global report is an important step in advancing the field of child injury prevention, but it is only one such step. It is the hope of WHO, UNICEF and all involved in the report that its launch will lead to greater awareness around the world and a much increased political will for action at all levels to combat the scourge of child injuries.

Choose a function:

Preparation: Report introduction

Draft the introduction to your report now. If you chose to write your introduction earlier when you drafted the body of your report, review it now with this module section in mind.

Your introduction should include your main message, and provide sufficient background information to introduce your main message to your reader. A good introduction is usually short, providing orientation to the document, but not providing extraneous information.

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Report conclusion

Reports that are primarily analytical usually require conclusions. These are sometimes combined with recommendations. Proposals often use conclusions to provide a final word to the readers (i.e. the potential donors) because having an impact at the end of the proposal is important. You can also improve executive summaries and large sections of major reports by including conclusions. With some long reports, a conclusion may take up an entire section or chapter of the report. In cases like this, you will often also see conclusions for each chapter.

The conclusion enables you to reinforce the main messages of the document. A conclusion summarizes the report as a whole, drawing inferences from the entire process about what has been found, or decided, and the impact of those findings or decisions.

Even in a short report, it is useful to include a conclusion. A conclusion demonstrates good organization. When written well, it can help make the reader's task easier. With a good conclusion, you can pull all the threads of the report details together and relate them to the initial purpose for writing the report. In other words, the conclusion should confirm for the reader that the report's purpose has been achieved.

Conclusion Example 1: A longer report

Conclusion Example 2: A proposal

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Practice: Conclusions

Earlier you worked with the introduction for the *2008 World Report on Child Injury Prevention*. Now you will consider one of the chapters within that report. Read the main message, roadmap and chapter outline for the chapter on drowning. We have suggested three areas that might be addressed in the conclusion. For each one, decide if it should be included or not. Once you've decided, review our comments. Then read the chapter conclusion.

2008 World Report on Child Injury Prevention

Chapter 3: Drowning

Main message: In most countries around the world, drowning ranks among the top three causes of death from unintentional injury, with the rates highest among children under five years of age.

Document roadmap: This chapter describes the magnitude of the phenomenon of childhood drowning around the world, in terms of deaths, morbidity and disability – pointing to the likelihood that the true size of the problem has been substantially underestimated. It summarizes the risk and protective factors, with the Haddon matrix as a framework, and sets out the various prevention strategies, both proven and promising. The chapter concludes with recommendations, urging that confronting this preventable injury should be made a priority and given proper resources for research and prevention efforts.

Chapter outline

1.Introduction

2.Epidemiology of drowning
- 2.1.Mortality
- 2.2.Morbidity
- 2.3.Economic impact of drowning
- 2.4.Limitations of data

3.Risk factors
- 3.1.Child-related factors
- 3.2.Agent factors
- 3.3.Environmental factors
- 3.4.Access to treatment and rehabilitation

4.Interventions
- 4.1.Engineering measures
- 4.2.Environmental measures
- 4.3.Legislation and standards
- 4.4.Developing education and skills
- 4.5.Managing drowning
- 4.6.Adapting interventions
- 4.7.Further research on interventions

5.Conclusions and recommendations
- 5.1.Recommendations

6.References

Place a checkmark next to the areas you feel should be included in the conclusion of this chapter. Then click to see our comments.

- ☐ Recommendations for specific approaches to preventing drowning
- ☐ A call for further research
- ☐ A summary of successful interventions to reduce drowning

Click here to reveal our comments.

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Preparation: Write a conclusion

Now draft the conclusion of your report or proposal using the ideas discussed in this section and the examples given. Remember to ensure that your conclusion is based on discussion within the body of your document.

If you chose to write your conclusion earlier when you drafted the body of your document, review it now with this module section in mind.

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Report recommendations

Recommendations are often included with a report's conclusion, although they serve different purposes. Whereas a conclusion offers you the opportunity to summarize or review your report's main ideas, recommendations suggest actions to be taken in response to the findings of a report. You can regard recommendations as a prompt to action for your readers. As you have seen from your planning, your report structure should lead up to the recommendations and provide justification for them. Just as a proposal grows from your project's goals and objectives, a report should actually grow backwards from your recommendations. Having your recommendations accepted then becomes part of your purpose.

What makes a good recommendation? Effective recommendations:

- describe a suggested course of action to be taken to solve a particular problem;
- are written as action statements without justification;
- are stated in clear, specific language;
- should be expressed in order of importance;
- are based on the case built up in the body of the report; are written in parallel structure.

A word of caution about writing recommendations: you should always consider your relationship with the reader first. If you have no authority to make recommendations, the reader may be hostile to their presence.

Have a look at the following examples from different types of reports. Many of the recommendations included here are well written but a few contain some significant shortcomings. Position your cursor over the excerpts to see our comments.

EXAMPLE 1

The following example comes from an evaluation report.

RECOMMENDATIONS

It would be inappropriate to conclude this report without making reference to the question "What next?" What follows is a list of key recommendations that have emerged from our findings. We hope that these can be taken forward by key organizations and institutions in order that Uganda can improve its proud record of resisting HIV/AIDS-related DSD.

Efforts to tackle HIV/AIDS-related DSD have been assisted by governmental guidelines issued as part of the National AIDS Policy. There is need to enact sectoral legislation that covers the full range of rights issues identified in this report.

Existing laws and new legislation must address issues of inheritance, health care, employment, education, housing, and social security.

Although education and information campaigns have been mounted with some success by both government and NGOs, it is vital that specific attitudinal work be undertaken to challenge particular stereotypes and myths about HIV. In particular, the idea that only promiscuous men and women can get AIDS must be challenged by individuals and institutions throughout the country.

There is evidence that counselling and other support work by NGOs and other organizations is valuable in countering DSD. Such services should be developed and expanded.

People with AIDS should be encouraged and helped to be more open about their serostatus and to fulfil their responsibilities to the wider society, thereby lessening DSD.

Greater attention needs to be paid to the gendered nature of DSD in Uganda. Women's rights of inheritance, social security, and housing should be protected, and women's specific health needs should be addressed.

next example ▶

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Preparation: Report recommendations

Does your report require recommendations to achieve its purpose? If it does, draft them now following the guidelines you have been given in this section of the module.

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Executive summary

Executive summaries target a certain type of reader for your document. They are usually key decision-makers who don't have time to get into the specifics of the report, yet at the same time they need to know the overall picture. They tend to focus their attention on the main findings and recommendations of your report or on the project goals of your proposal.

Steps in writing an executive summary

Following this process should help you create effective summaries regardless of the size of the task. You will notice that writing an executive summary more or less follows the process for writing an entire report or proposal.

1. Read your completed document from beginning to end.
2. Immediately write the main purpose of the document in a short paragraph if possible.
3. Reread the document. As you find the main points, summarize them in a few words (identifying topic sentences in paragraphs should help). Do not copy chunks of text from the document.
4. Note any conclusions and recommendations made.
5. Write a first draft of your summary from your notes without referring to the main document.
6. Reread the document and make changes to your draft summary if you discover omissions or faulty emphasis.
7. As for any other document, revise for mechanics and flow. Then proofread.

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Executive summary contents

The executive summary should provide an overview of the entire document. Note the connections between the table of contents of this document, and its executive summary.

First click the link below to read the table of contents and executive summary. Try to find the connections between them.

Executive summary example

Next, click the link below to see the document with the connections between the table of contents and executive summary highlighted.

Executive summary example (highlighted)

The full report, *Interventions to address HIV in prisons: HIV care, treatment and support* is available online:

http://www.who.int/hiv/pub/idu/prisons_hiv_care/en/index.html

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Preparation: Executive summary

By now you should have one of the following drafts:

- A report complete with an introduction, conclusion, and (if required) a set of recommendations; or
- A proposal including a set of project goals and objectives.

Write an executive summary for your report or proposal. Remember that it should be in proportion to the length of your report. For example, if your report is 4-10 pages, the executive summary should range from a third of a page to one page long.

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Communicating information visually

An effective report depends not only on clear language, but also on professional presentation. A report that is visually well designed, including formatting, style and page layout, will contribute to your credibility as a writer and your report's credibility. Often you will be able to work within a prescribed template that sets a lot of the formatting for you; other times, you will need to do establish your own look and feel for the report. In such cases, you should keep it simple. Too much formatting is a distraction.

Apart from the page design of your work, reports can be greatly enhanced by an intelligent use of visual information. This type of presentation includes diagrams, tables (especially for figures and statistics), graphs, illustrations and maps. They can be invaluable aids for your audience because they condense text, clarify relationships and highlight patterns.

The danger is that when visual information is not presented properly, it can actually detract from the quality of the report. This part of the module assumes you are working without the support of specially trained staff to help design and produce visual information, so the advice here focuses on how to take advantage of visual elements in a report without the need of expert knowledge in graphic design.

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Criteria for selection and presentation

There are many ways to communicate information visually. Visual elements must be relevant to the text, and must enhance the explanation you provide in words. It is not enough simply to refer your readers to the element and hope that they will understand its relevance.

Tables

Tables are the easiest visual to create with your standard word processing software. However, because tables can contain quite a lot of information in a short space, you must be careful not to bombard your readers with too much information.

Graphs and charts

Both Word and Excel are able to automatically create graphs and charts. Graphs make it visually easier for the reader to grasp general trends. Remember, though, that some readers need the detail of actual figures. Always choose a method of presenting information graphically that fits with the reader's needs.

- Pie charts may be used to depict proportions that make up a whole, such as budget categories or survey breakdowns.
- Bar charts (histograms) may be used to show comparisons, distributions, or category tabulations.
- Line graphs display qualitative information by means of lines; they are extremely versatile and are therefore used extensively.
- All graphs and charts
  - must be clear and easy to read;
  - must be labelled;
  - must have labels large enough to be visible.

Photographs

Photographs are invaluable when developing human interest stories. They can help create an impression about the impact of WHO's work better than a text-based description. You need to be judicious in your selection of photos to include to make the most of their impression on your readers. To see many examples of effective use of photos, consult the WHO website.

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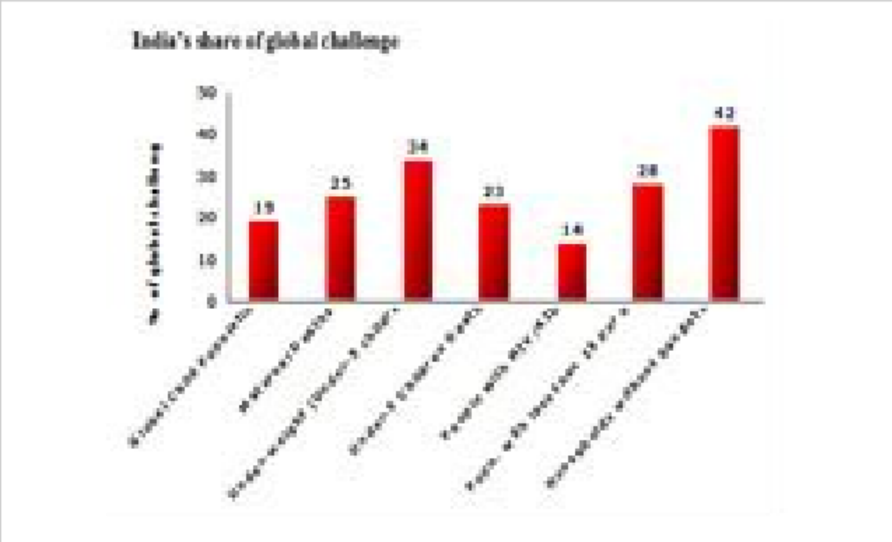
Practice: Evaluating visual elements

Here you have a chance to look at some visual elements to determine their value in communicating information effectively. Consider the tables and graphs in the practise exercise below. Comment on their effectiveness, then click the button to see our comments.

Example 1



Your comments:

Click here to reveal our comments.

Photographs

Photographs are invaluable when developing human interest stories. A carefully-chosen photograph with a clearly-written cutline that ties it to the report content can provide a strong human interest element, even if the document itself does not expand on the story. Photographs can help create an impression about the impact of WHO's work better than a text-based description. You need to be judicious in your selection of photos to include to make the most of their impression on your readers. To see many examples of effective use of photos, consult the WHO website. Almost always, the home page (http://www.who.int/en/) features a photograph emphasizing the human interest in one of the featured articles.

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Putting them all together

Take a look at a report that uses a variety of visual elements to enhance its presentation of information: *World Report on Violence and Health: Summary*. Quickly scan the report's contents to see how many visual elements you can identify. Here are a few from the first few pages:

- Call out boxes for summaries and case studies (pgs. 2, 3, 6, 8…)
- Figures/illustrations (pgs. 5, 9, 14)
- Graphs (pg. 7)
- Tables (pgs. 7, 15)

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Formatting visual elements

It is not enough simply to add a visual element in place of descriptive or analytical text. The visual can enhance the written parts of your report, but you must also use your writing to enhance the contribution made by the visual element. That means using your text to interpret or highlight main points within a diagram, an image, or a chart.

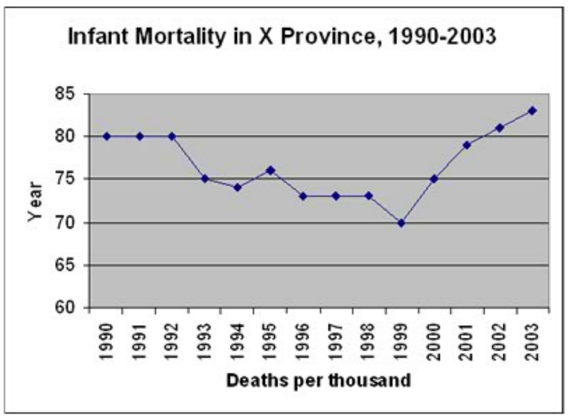
When deciding whether or not to use visual elements and considering how to use them most effectively, keep the following factors in mind:

- relevance and purpose – a visual element is not used to best advantage if its purpose is just to break up text. It should somehow make a contribution, bringing a story to life (in the case of a photograph), making a trend obvious (in the case of a graph) or allowing easy comparison of numbers (as in a table);
- clarification, simplification and emphasis – a table or graph can be easier to interpret than a paragraph of text, particularly if numbers are being compared;
- reinforcement and explanation – text and graphic may make the same point. The graphic reinforces the text, and vice versa.

Remember: You need to cite your sources for all data and references used in your reports, including visual information.

Practice: Formatting visual elements

The text paragraph here mentions the graph (Figure 1), but it does not adequately direct the reader's attention to the graph's significance. How would you revise the paragraph to make full use of the graphic?



Infant mortality fluctuates in response to many factors, including the general health of the population (Figure 1). General factors that influence infant mortality include the health of the mother and her access to nutrition, sanitary conditions in the home and parents' (particularly mothers') understanding of the care of children. HIV infection rates also contribute to infant mortality in significant ways. Maternal mortality and morbidity is an important factor.

Your revision:

Click here to reveal our comments.

Preparation: Formatting visual elements

Review your report and identify points where visual elements would enhance the text. Select, format and add those elements. Remember to review the features that make a visual element effective.

Briefing notes

The aim of a briefing note is to provide clear, simple and concise information on a particular subject. Senior officers use briefing notes to prepare themselves for meetings and events. For example, you might be asked to provide a briefing note for your Regional Director to be used in negotiations on funding with a major donor. The note must provide just enough background for the reader to understand the situation, and should cover the main issues that might potentially be addressed. We call these briefing notes or simply briefs.

Types of briefing notes

At headquarters, the types of briefing notes required fall into five categories:

- briefs for the Director-General's meeting with dignitaries: health ministers, heads of states, other ministers, other international organizations, donors, NGOs or private foundations/industry or other prominent persons;
- briefs for input into the Director-General's speeches and/or the DG's participation in meetings;
- briefs for country visits regarding important issues and/or a programme with the country;
- technical briefs in relation to review of programmes — normally requested by the departments, or in the case of issues of current importance, by DGO;
- briefs for governing body issues: EB, WHA.

Other officers or groups of officers, including Regional Directors, Assistant Directors-General and groups of officers undertaking formal missions, may also require briefing notes.

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Readers of briefing notes

The key to a successful briefing note is empathy and anticipation. Imagine, in as much detail as possible, the situation where your reader will be using the brief and what they will be looking for. As one WHO writer described it: “What can the DG say about this that only the DG can say?” Writing a clear, concise briefing note is another way for you to participate in the global conversation about advancing public health.

Focus clearly on your reader, and what they need to know. Make sure you write for your reader, not about your reader. Here’s an example. Imagine you are writing a brief for me, and that I am the Regional Director. If I find a sentence that says, “The Regional Director attended the meeting in July,” I will instantly be aware that you are writing about me, but you are not writing for me. (Either that, or I will be confused and think you are talking about a different Regional Director!) I know I attended the meeting: Tell me what I need to do now to follow up.

You also need to think about why you have been asked to provide the brief. It is usually because of your expert knowledge of the issues and the outcomes that need to be achieved for WHO work to progress. Your role in providing a brief is twofold: supportive and advisory.

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Writing briefing notes with the context in mind

Briefing notes are never stand-alone documents. When drafting a brief, think of the context. The context includes a huge range of factors, from who will be attending the meeting, to the reason it is happening, to the time of day when it is scheduled. As you review this list, reflect on why each of these questions might be important.

Briefing notes: Questions to help with writing appropriately

Why is the meeting taking place?

- Is it in response to a crisis or specific event?
- Is it part of an ongoing dialogue?
- Is it a preliminary meeting, or part of a negotiation?

What is the purpose of the meeting?

- Is it for information?
- Is it to stimulate action?
- Who requested it?
- Is it part of a broader visit?
- Is it a formal call on a dignitary?
- Is it in preparation for a country visit?

What background material is already available?

- Are there earlier relevant briefs?
- Have there been related actions?

Who is involved in the meeting?

- What is the role of those attending? Are they donors, heads of state, heads of agencies ...?
- What level of expertise will they have in the subject?

What will the atmosphere of the meeting be like?

- Will it be formal or informal?
- Will it be held in a meeting room, or over dinner, or at the end of a long day?
- Will it be a one-on-one meeting, or will a large group attend?
- Will the atmosphere be tense? Friendly?

What language will the meeting be conducted in?

- Will there be translation? Simultaneous or serial?

How is your reader involved in the issue?

- Does it relate to anything else he or she is doing?
- Do you need to draw any links?

What is the scope of your brief?

- Is your brief intended to address a single issue, or prepare for the entire meeting?

Your first step in writing a briefing note should be to make sure you understand the purpose of the meeting and the role of the person you are briefing. You need to be very clear about what you are trying to achieve with your brief.

Briefing notes: General guidelines

- Keep your note as short as possible. Briefing notes may be read in a car or plane on the way to the meeting where they will be used. Each note must be suitable for a glance, not extensive study.
- Before you write, check the requirements of your reader for length and format.
- Do not exceed the stated length; if you do, someone else less knowledgeable than you about your programme may end up editing your content to fit. Do not reduce the point size of the font or widen the margins so that you can fit more onto that one page. Dense text will make it even more difficult for your reader to absorb your brief.
- Meet deadlines. If your brief is being written for one in a day-long series of meetings, it must be read the day before. If it's late arriving, it cannot be used and the information you think is important will not become part of the conversation.
- Keep it simple. Your brief will be one of many read that week.
- Stick to the issue. Don't include any extraneous information.
- Use plain English. Senior executives typically are not discussing the technical aspects of issues. Avoid buzzwords and non-specific words like "quite," "really," and "basically".
- Proofread carefully.
- Get someone else to read the draft and encourage them to be ruthless in their criticism. If they can't understand it, or find it long-winded, fix it.

Briefing notes for the Director General

The briefing notes for the Director-General should be short and in bullet points. They should highlight only the major issues. Since the purpose of these briefs is to ensure that the Director-General knows the outstanding current issues pertaining to the meeting, it is important that you present your information concisely and clearly.

Briefing notes for the Director-General contain just two sections:

- Background – minimal background information related to the current situation, reporting on WHO actions and, when appropriate, noting significant health events relevant to the discussion.
- Possible messages – statements that ask those attending the meeting to take some action. These statements begin with a verb, affirm what WHO is doing, and concentrate on specific actions.

For example, if the Director-General is scheduled to meet with the Minister of Health of a country experiencing an outbreak of a particular disease, the briefing note might contain just three sentences:

Background:

- Note with concern 23% increase in cases of X over the past five years in the country.
- Note ongoing [name of project] project with WHO and UNICEF in [XXX] province, where cases have declined by 12% in the same period.

Possible messages:

- Encourage the Minister of Health to work with WHO and UNICEF on an expansion of the [name of project] project in the coming year.

Note that even when a template is used, a variety of approaches may be taken within sections, and not all sections may be needed.

Be sure to use the most recent template for notes for the Director-General, available in your Word menu. If you will be writing briefing notes, check the Director-General's Office area on the WHO Intranet for additional information. There are very specific formatting requirements that we will not go into here.

Preparation: Write a briefing note

As part of your assignment, you are required to submit a briefing note to accompany your report or proposal. Write the briefing note as if you are preparing it for someone senior to you in the organization – someone who will be attending a meeting, and providing an update on recently-completed projects and proposals underway in your area. See the Part B Assignment page for details on preparing your briefing note.

Assignment: Preparing your briefing note

For the briefing note, use the headings from the Director-General's template for briefing notes. These are "background" and "possible messages.

The table below is not part of the standard template; it is provided to give you guide you in preparing a briefing note based on a proposal or report for your assignment. The questions are intended to help you think about the process; they are not intended to restrict you.

BACKGROUND	
For proposals	**For reports**
○ Why is the project being proposed? ○ Is it connected to earlier projects?	○ Why is the topic significant? ○ What public health issue was the project responding to?
POSSIBLE MESSAGES	
For proposals	**For reports**
○ Why is the project worthy of support?	○ Did the project achieve its goals? ○ What are the most significant recommendations?

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REVISING

You are almost at the end of this journey. It's time to take a final critical look at the document you have produced. At this stage, you should have a good draft whose parts (such as project goals, introduction, conclusion, recommendations, executive summary, and accompanying briefing note) you can review and improve. You should strive to make the shift from a writer view to a reader view in order to edit and proofread well.

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Preparation: Reviewing your document

Approach your first draft with the objective of improving its quality. Convince yourself that you are your own most critical reader. You should do the following:

- search for omissions and errors of fact;
- eliminate unnecessary and repeated material;
- be critical of your major findings and conclusions;
- identify points that need more support or less support. If you lack information, make notes on the draft about the lack and where to find what is required;
- be ruthless about cutting: your readers will thank you for it.

Remember: it has been said that a writer's best tool is the wastepaper basket!

Revising Checklist 1: Structure and Organization

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Reflection: Revising

Based on the Module 1 Part B (portfolio) assignment, review your report for characteristic errors and revise as needed. Use the Revising Checklist 1: Structure and Organization to help with your review.

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Proofreading

You have already considered strategies for proofreading from Module 1. Review that section of Module 1 now so that you can apply those strategies directly to your report.

Proofreading is the most detailed view you take of your writing. Here are some particular strategies you can employ:

- Ensure that all the mechanical elements in your draft are correct: sentence structure, grammar, punctuation, spelling and word usage;
- one way to ensure this consistency is to use a checklist to help you define what you need to look out for as you edit your report. Some departments may already provide a checklist for you that you can submit along with your report;
- for those who do not have one, consider the following sample checklist as a good starting point. You can add or change anything to suit your own purposes.

Many of the points in the checklist are based on the issues you considered in Module 1.

Revising Checklist 2: Proofreading

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Preparation: Proofreading

Proofread your report using the Revising Checklist 2. This will help you focus on specific areas that may need proofreading.

By proofreading your draft, you will have prepared the Part B of your assignment for this module.

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Assignment 3

Your assignment consists of a short document or extract of a larger document. Your assignment submission should be within the range of 4-10 pages. Contact your tutor to ensure the scope is appropriate.

You will submit assignments in two sections. The planning documents are the first section of the assignment (**Part A**). Submit these at the end of the section on organizing, as you prepare to draft your report.

Part B, the document (report, proposal) or a section of that document and an accompanying briefing note, is due when you complete your proofreading. Use the feedback your tutor provided on your planning documents to inform your writing.

More specific instructions for Part A and Part B of your assignment are included on the following screens.

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Part A: Planning documents

Part A of your assignment consists of four components:

- Your **timeline for document completion**, including major tasks to be completed and target dates for each
- Your **report/proposal planning document** considering primary and secondary readers for the report, and including your report purpose and main message
- A **document outline**, including headings to at least two levels
- Your **completed list** of guidelines, terms of reference, style guides etc. that you are using to create your document

If you are writing only one section of a report or proposal:

- a **description** of the full report/proposal.

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Part B

The Part B assignment consists of two parts:

- draft of either a full document (concept note, report, proposal or letter of intent) or a section of a longer document;
- draft of a briefing note based on your document.

Submit Part B of your assignment once you are finished the course activities. Your tutor will review your work and provide you with feedback. Remember that revision based on feedback from critical readers is an important part of the writing process; do not feel discouraged if your tutor asks you to revise and resubmit your documents.

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Completing your assignment

Your tutor will be checking that your report or proposal has the following characteristics:

- a clear purpose;
- an awareness of your readers;
- headings of up to three levels;
- well-constructed paragraphs;
- appropriate organization;
- a summary, introduction and conclusion, and recommendations or project goals if required;
- a style appropriate to its purpose and reader;
- no spelling, grammatical or other mechanical errors;
- formatting and presentation according to WHO standards and guidelines.

Revising submissions

Your tutor will work with you to help you meet the criteria outlined. Your tutor may ask you to do further editing after your first submission. That is a normal part of professional writing, and should not give you cause for concern. You have the opportunity to resubmit each assignment twice. Your tutor will give you feedback on your assignment. If your work requires editing after the first or second submission, you can rework the assignment in the light of the feedback and resubmit.

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Resources

- Revising Checklist 1: Structure and Organization
- Revising Checklist 2: Proofreading
- WHO Style Guide
- Report/Proposal Planning Document

In addition to these course resources, if you are writing a proposal you will find the Foundation Center's short introduction to proposal writing valuable. It is available online:

http://foundationcenter.org/getstarted/tutorials/shortcourse/index.html

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Summary

This module has taken you through the entire process for report/proposal writing from the initial planning stages to your final proofreading. Along the way through this process, you should have also reviewed parts of Module 1 and applied the techniques you learned there: techniques like prewriting, outlining, paragraph writing, drafting, and revising.

The importance of planning and organizing your thoughts and ideas for your report cannot be overemphasized. You should begin outlining your report with a clear idea of your purpose and main message. This will enable you to proceed to the next step in the planning process—outlining your document before you begin drafting.

Drafting involves two main tasks:

1. preparing each section of your document, like the introduction, conclusion, recommendations, and summary, and
2. composing clear and coherent paragraphs and correct sentences.

As you revise your report or proposal, be aware of the rules of mechanics used to ensure the quality and consistency of written materials at WHO. Be sure to use WHO-recommended reference texts, such as style guides, guidelines, and dictionaries or the resources recommended or required by your donors (e.g. the Gates Foundation, Bloomberg Foundation, the European Commission). The final stage of reviewing your document involves a close look at the details of style and mechanics.

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Completing the course

Congratulations! The assignment for this module marks the end of your work on this course. Once you have submitted your final assignment, you will receive feedback from your tutor as usual. In addition, your tutor will confirm that you have completed the course.

Following your assignment, we have a favour to request of you: Fill out a course evaluation form to be submitted anonymously. The COL course coordinator will send you a link to the questionnaire after you have completed your final revisions. We would be grateful if you would complete the evaluation within a week of receipt.

Once your tutor confirms that you have successfully completed the course, you will receive a certificate of completion. You will receive the certificate approximately one month after the course officially ends.

We hope that you have enjoyed this learning experience and found it beneficial for your writing needs at the World Health Organization. We wish you all the best in your writing endeavours at WHO.

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