

CHAPTER 9

Informal Reports

Instructor Only Version
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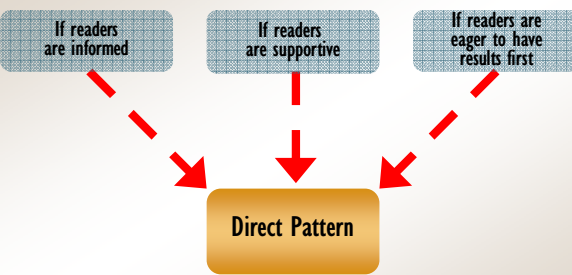
Understanding Report Basics

<p>Functions</p> <ul style="list-style-type: none"> ▪ Informative reports ▪ Analytical reports 	<p>Patterns</p> <ul style="list-style-type: none"> ▪ Direct Pattern ▪ Indirect pattern
<p>Formats</p> <ul style="list-style-type: none"> ▪ Letter ▪ Memo ▪ Manuscript ▪ Printed form ▪ Digital 	<p>Report Delivery</p> <ul style="list-style-type: none"> ▪ In person ▪ U.S. mail ▪ Fax ▪ E-mail or online ▪ Online

Mary Ellen Guffey, *Essentials of Business Communication*, 8e Chapter 9, Slide 2

Patterns

The Direct Pattern



If readers are informed


If readers are supportive

If readers are eager to have results first

Direct Pattern

Mary Ellen Guffey, *Essentials of Business Communication*, 8e Chapter 9, Slide 3

Patterns



Direct Pattern

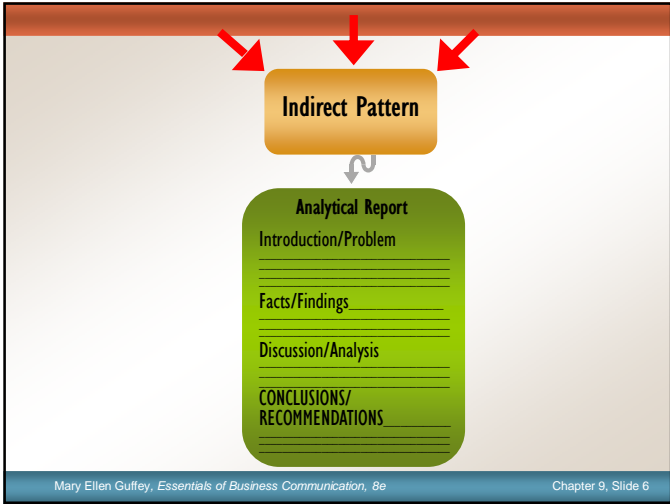
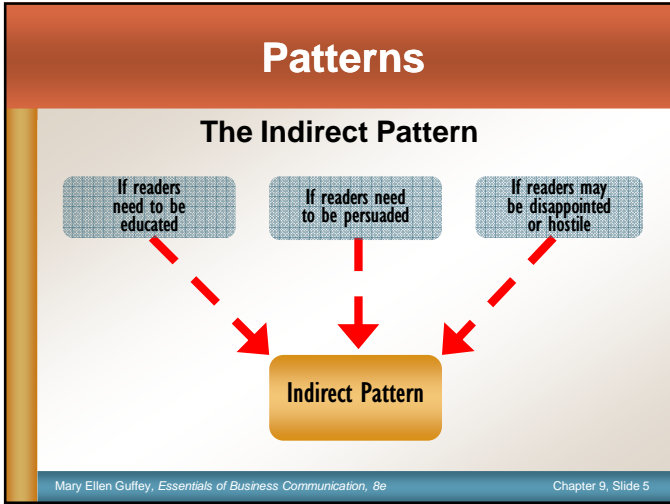
Informational Report

- Introduction/Background
- Facts/Findings
- Summary

Analytical Report

- Introduction/Problem
- CONCLUSIONS/RECOMMENDATIONS
- Facts/Findings
- Discussion/Analysis

Mary Ellen Guffey, *Essentials of Business Communication*, 8e Chapter 9, Slide 4



Information Report—Letter Format

Adobe Acrobat 7.0 Document

go to page 3, Fig 9.2

Mary Ellen Guffey, *Essentials of Business Communication, 8e* Chapter 9, Slide 7

Report Formats

Letter	Letterhead stationery. Useful for informal reports sent to outsiders.
Memo	Memo style. Useful for informal reports circulated within organizations.
Manuscript	Plain paper. Useful for longer, more formal reports.
Printed form	Standardized forms. Useful for routine activities, such as expense reports.
Digital	Viewed online. Useful for collaboration and for posting to company intranet.

Mary Ellen Guffey, *Essentials of Business Communication, 8e* Chapter 9, Slide 8

FIGURE 9.2 Information Report—Letter Format With E-Mail Transmittal

Dear Ms. Burgess:

As you requested, I am sending you information that discusses how your homeowners' association can provide a free legal services plan for its members.

Should you have any questions that the attached report does not answer, please let me know. My contact information is listed below.

Sincerely,


Richard M. Ramos

Richard M. Ramos, Esq., Executive Director
Center for Consumers of Legal Services
Richmond, VA 23234 • (804) 248-8931
rramos@clegalservices.com
www.clegalservices.com

Uses formal salutation in an e-mail to a customer

Announces attachment

Provides complimentary close and signature block with contact information

 **Center for Consumers of Legal Services**
P.O. Box 260
Richmond, VA 23234
(804) 248-8931
www.clegalservices.com

September 17, 200x

Ms. Lisa Burgess, Secretary
Lake Austin Homeowners
3902 Oak Hill Drive
Austin, TX 78134

Dear Ms. Burgess:

As executive director of the Center for Consumers of Legal Services, I'm pleased to send you this information describing how your homeowners' association can sponsor a legal services plan for its members. After an introduction with background data, this report will discuss three steps necessary for your group to start its plan.

Introduction

A legal services plan promotes preventive law by letting members talk to attorneys whenever problems arise. Prompt legal advice often avoids or prevents expensive litigation. Because groups can supply a flow of business to the plan's attorneys, groups can negotiate free consultation, follow-up, and discounts.

Two kinds of plans are commonly available. The first, a free plan, offers free legal consultation along with discounts for services when the participating groups are sufficiently large to generate business for the plan's attorneys. These plans actually act as a substitute for advertising for the attorneys. The second common type is the prepaid plan. Prepaid plans provide more benefits, but members must pay annual fees, usually of \$200 or more a year. More than 30 million people are covered by legal services plans today, and a majority belong to free plans.

Because you inquired about a free plan for your homeowners' association, the following information describes how to set up such a program.

Determine the Benefits Your Group Needs

The first step in establishing a free legal services plan is to meet with the members of your group to decide what benefits they want. Typical benefits include the following:

Free consultation. Members may consult a participating attorney—by phone or in the attorney's office—to discuss any matter. The number of consultations is unlimited, provided each is about a separate matter. Consultations are generally limited to 30 minutes, but they include substantive analysis and advice.

Free document review. Important papers—such as leases, insurance policies, and installment sales contracts—may be reviewed with legal counsel. Members may ask questions and receive an explanation of terms.

Uses letterhead stationery for an informal report addressed to an outsider

Presents introduction and facts without analysis or recommendations

Arranges facts of report into section with descriptive headings

Emphasizes benefits in paragraph headings with boldface type

FIGURE 9.2 Continued

Identifies second and succeeding pages with headings

Uses parallel side headings for consistency and readability

Includes complimentary close and signature

Ms. Lisa Burgess Page 2 September 17, 200x

Discount on additional services. For more complex matters, participating attorneys will charge members 75 percent of the attorney's normal fee. However, some organizations choose to charge a flat fee for commonly needed services.

Select the Attorneys for Your Plan

Groups with geographically concentrated memberships have an advantage in forming legal plans. These groups can limit the number of participating attorneys and yet provide adequate service. Generally, smaller panels of attorneys are advantageous.

Assemble a list of candidates, inviting them to apply. The best way to compare prices is to have candidates submit their fees. Your group can then compare fee schedules and select the lowest bidder, if price is important. Arrange to interview attorneys in their offices.

After selecting an attorney or a panel, sign a contract. The contract should include the reason for the plan, what the attorney agrees to do, what the group agrees to do, how each side can end the contract, and the signature of both parties. You may also wish to include references to malpractice insurance, assurance that the group will not interfere with the attorney-client relationship, an evaluation form, a grievance procedure, and responsibility for government filings.

Publicize the Plan to Your Members

Members won't use a plan if they don't know about it, and a plan will not be successful if it is unused. Publicity must be vocal and ongoing. Announce it in newsletters, meetings, bulletin boards, and flyers.

Persistence is the key. All too frequently, leaders of an organization assume that a single announcement is all that is needed. They expect members to see the value of the plan and remember that it is available. Most organization members, though, are not as involved as the leadership. Therefore, it takes more publicity than the leadership usually expects in order to reach and maintain the desired level of awareness.

Summary

A successful free legal services plan involves designing a program, choosing the attorneys, and publicizing the plan. To learn more about these steps or to order a \$45 how-to manual, call me at (804) 355-9901.

Sincerely,

Richard M. Ramos, Esq.
Richard M. Ramos, Esq.
Executive Director

pas

Tips for Letter Reports

- Use letter format for short informal reports sent to outsiders.
- Organize the facts into divisions with consistent headings.
- Single-space the body.
- Double-space between paragraphs.
- Leave two blank lines above each side heading.
- Create side margins of 1 to 1 1/4 inches.
- Start the date 2 inches from the top or one blank line below the last line of the letterhead.
- Add a second-page heading, if necessary, consisting of the addressee's name, the page number, and the date.

Guidelines for Developing Informal Reports



- Determine problem and purpose.
- Gather data.
- Organize data.
- Write first draft.
- Edit and revise.

Where to Gather Data for Reports

- Look in company records.
- Make personal observations.
- Use surveys, questionnaires, and inventories.
- Conduct interviews.
- Search printed material such as books, newspapers, and periodicals.
- Search databases and other electronic resources.

Developing an Appropriate Writing Style

Report Writing Styles – Informal Style

Informal Writing Style	
Use	Short, routine reports Reports for familiar audiences Noncontroversial reports Most reports to company insiders
Effect	Feeling of warmth, personal involvement, closeness
Characteristics	Use of first-person pronouns (<i>I, we, me, my, us, our</i>) Use of contractions (<i>can't, don't</i>) Emphasis on active-voice verbs (<i>I conducted the study</i>) Shorter sentences; familiar words Occasional use of humor, metaphors Occasional use of colorful speech Acceptance of author's opinions and ideas

Report Writing Styles –Formal Style

	Formal Writing Style
Use	Theses Research studies Controversial or complex reports (especially to outsiders)
Effect	Impression of objectivity, accuracy, professionalism, fairness Distance created between writer and reader
Characteristics	Absence of first-person pronouns; use of third person (<i>the researcher, the writer</i>); increasingly, however, the informal style is acceptable Absence of contractions (<i>cannot, do not</i>) Use of passive-voice verbs (<i>the study was conducted</i>) Complex sentences; long words Absence of humor and figures of speech Reduced use of colorful adjectives and verbs Elimination of "editorializing" (author's opinions, perceptions)

Being Objective in Writing Reports

- Present both sides of an issue.
- Separate fact from opinion.
- Be sensitive and moderate in language.
- Cite sources carefully.



Making Effective Report Headings

- Use appropriate heading levels.
- Strive for parallel construction within levels.
- Use first- and second-level headings for short reports.
- Capitalize and underline carefully.
- Keep headings short but clear.

Making Effective Report Headings

- Don't use headings as antecedents for pronouns.
For example, avoid:
Inserting Hypertext Links. These links
- Include at least one heading per report page.

Preparing Typical Informal Reports

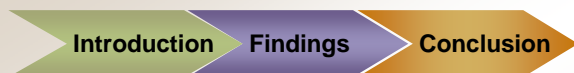
- 1 Information reports
- 2 Progress reports
- 3 Justification/recommendation reports
- 4 Feasibility reports
- 5 Minutes of meetings
- 6 Summaries



1 Information Reports

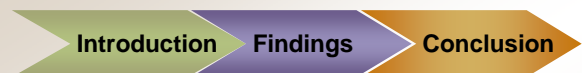
Information reports provide findings without analysis or persuasion. For example, your boss asks you to investigate prepaid legal services as a possible employee benefit.

Information Reports



- Explain why you are writing; define purpose.
- Describe credibility of data methods and sources.
- Provide background.
- Preview what is to follow.

Information Reports



- Organize chronologically, alphabetically, topically, by importance, or by another method.
- Group similar topics together.
- Use appropriate headings.

FIGURE 9.3 Information Memo Report—Trip Report With E-Mail Transmittal

Hi, Mark!

As you requested, I am sending you the attached trip report describing my amazing experiences at the largest IT trade show in the world, the CeBIT.

Thank you for the opportunity. I networked with lots of people and, yes, I had a blast.

Cheers,

Grant

Grant Snow, Developer
Idea Networking Solutions, Inc.
408.599.3434 Ext. 598
gsnow@ideaNTSolutions.com
www.idea-networking-solutions.com

Uses informal form of address in e-mail cover note announcing attached memo

Uses informal yet professional language

Includes complimentary close and signature block

IDEA NETWORKING SOLUTIONS, INC.
MEMORANDUM

Date: March 16, 200x
To: Mark Roach, IT Director
From: Grant Snow, Developer *GS*
Subject: Trip Report from the CeBIT Trade Show in Hannover, Germany

For the first time, I attended the huge CeBIT computer show in Hannover on March 4–9. CeBIT runs for six days and attracts almost 500,000 visitors from Germany, Europe, and all over the world to the famed Hannover fairgrounds. It features 27 halls full of technology and people. If you have been to Comdex Las Vegas in the fall, think of a show that is easily five times larger. Let me describe our booth, overall trends, and the contacts I made in Hannover.

Our Presence at the Fair

Our Idea Networking Solutions booth spanned two floors. The ground floor had a theater with large screen, demonstration stations, and partners showing their products and services. Upstairs we had tables and chairs for business meetings, press interviews, food, and drinks—along with a kitchen with a cooking area and a dishwasher. Because no one has time to get food elsewhere, we ate in the booth.

Current Trends

What was the big news from this year's CeBIT? The top story was "Green IT." The expo management decided to spotlight a range of topics dealing with Green IT, showcasing many approaches in the "Green IT Village" in Hall 9. The main focus centered on highly energy-efficient solutions and power-saving technologies and their contribution to climate protection. Green IT is the big buzzword now and was even dubbed the "Megatrend of this expo" by the organizer. Only the future will tell whether Green IT will be able to spawn attractive new business areas.

Meeting Customers and Prospects

Like any major trade show, CeBIT is a great way to connect with customers and prospects. Sometimes it is a way of meeting people you only knew virtually. In this case, we had three fans of our Internetpakt.com podcast visit us at the booth: Jürgen Schmidt, Karin Richter, and Peter Jahn of MEGAFunk. All three came in our white INS T-Shirts, which could only be rewarded with new black Internetpakt.com T-Shirts. All in all, we made about 600 contacts and have 50 solid leads. The visit was definitely worthwhile and will pay off very soon.

In closing, this was probably one of the best conference experiences I've ever had. Customers and partners like INS; they are excited about our technology, and they want more. Some know us because of our software solutions and were surprised to learn that we sell hardware, too (this is a good sign). All want us to grow and gain in influence.

Check out my CeBIT photo gallery on Flickr for more impressions of our booth at CeBIT with comments. Thank you for giving me the opportunity to network and to experience one of the biggest trade shows in the business. My itemized expenses and receipts are attached.

Identifies the event

Focuses on three main points

Summarizes key information

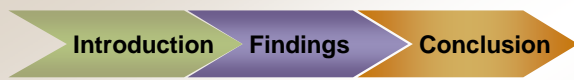
Highlights the value of the trip

Shows appreciation and mentions expenses

Tips for Trip Reports

- Use memo format for short informal reports sent within the organization.
- Identify the event (exact date, name, and location) and preview the topics to be discussed.
- Summarize in the body three to five main points that might benefit the reader.
- Itemize your expenses, if requested, on a separate sheet. Mention this in the report.
- Close by expressing appreciation, suggesting action to be taken, or synthesizing the value of the trip or event.

Information Reports



- Summarize findings.
- Suggest action to be taken.
- Express appreciation, if applicable.

② Progress Reports

Progress reports explain the progress of continuing projects. For example, you must report on the progress of a golf tournament your organization is planning.

Progress Reports

- Specify in the opening the purpose and nature of the project.
- Provide background information if the audience requires filling in.
- Describe the work completed.



Progress Reports

- Explain the work currently in progress, including personnel, activities, methods, and locations.
- Anticipate problems and possible remedies.
- Discuss future activities and provide the expected completion date.



FIGURE 9.6 Progress Report—Memo Format

Starshine Film Productions
Interoffice Memo

Date: February 7, 200x
To: Robert Hayashi, Executive Producer
From: Robin Ellsworth, Location Manager *R.E.*
Subject: Sites for *Byron the Cat* Telefilm

This memo describes the progress of my search for an appropriate rustic home, villa, or ranch to be used for the wine country sequences in the telefilm *Byron the Cat*. Three sites will be available for you to inspect on February 21, as you requested.

Background: In preparation for this assignment, I consulted Director Wash Westmore, who gave me his preferences for the site. He suggested a picturesque ranch home situated near vineyards, preferably with redwoods in the background. I also consulted Producer Richard Glatzer, who told me that the site must accommodate 55 to 70 production crew members for approximately three weeks of filming. Jana Novotna, studio accountant, requested that the cost of the site not exceed \$24,000 for a three-week lease.

Work Completed: For the past eight days I have searched the Russian River area in the Northern California wine country. Possible sites include turn-of-the-century estates, Victorian mansions, and rustic farmhouses in the towns of Duncans Mills, Sebastopol, and Guerneville. One exceptional site is the Country Meadow Inn, a 97-year-old farmhouse nestled among vineyards with a breathtaking view of valleys, redwoods, and distant mountains.

Work To Be Completed: In the next five days, I will search the Sonoma County countryside, including several wineries such as Geyser Peak, Canyon Road, and Rodney Strong. Many old wineries contain charming structures that may present exactly the degree of atmosphere and mystery we need. These wineries have the added advantage of easy access. I will also inspect possible structures at the Armstrong Redwoods State Reserve and the Kruse Rhododendron Reserve, both within 100 miles of Guerneville. I have made an appointment with the director of state parks to discuss our project, use of state lands, restrictions, and costs.

Anticipated Problems: You should be aware of two complications for filming in this area.

1. Property owners seem unfamiliar with the making of films and are suspicious of short-term leases.
2. Many trees won't have leaves again until May. You may wish to change the filming schedule somewhat.

By February 14 you will have my final report describing the three most promising locations. Arrangements will be made for you to visit these sites February 21.

Tips for Writing Progress Reports

- Identify the purpose and nature of the project immediately.
- Supply background information only if the reader must be educated.
- Describe the work completed.
- Discuss the work in progress, including personnel, activities, methods, and locations.
- Identify problems and possible remedies.
- Consider future activities.
- Close by telling the expected date of completion.

Identifies project and previews report

Saves space by integrating headings into paragraphs

Tells the bad news as well as the good

Concludes by giving completion date and describing what follows

Justification/ Recommendation Reports

Justification/recommendation reports are written to justify or recommend something, such as buying equipment, changing a procedure, hiring an employee, consolidating departments, and so forth.

Reader Response Determines Structure

Reader will likely agree with recommendations

Reader may oppose recommendations

Direct Pattern

- Problem
- Recommendations
- Facts
- Discussion

Indirect Pattern

- Problem
- Facts
- Discussion
- Recommendations

Justification/ Recommendation Reports

- Use direct organization for nonsensitive topics and recommendations that will be agreeable to readers.
- Use indirect organization when readers may oppose a recommendation or when circumstances suggest caution.
- Identify the problem or the need briefly.
- Announce the recommendation, solution, or action concisely and with action verbs.

Direct Pattern

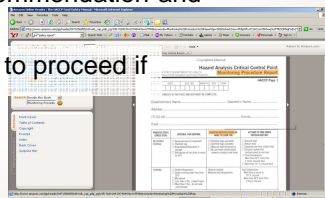
- Identify the problem or the need briefly.
- Announce the **recommendation**, solution, or action concisely and with action verbs.
- Explain more fully the benefits of the recommendation or steps to be taken to solve the problem.
- Present a discussion of pros, cons, and costs.
- Conclude with a summary specifying the recommendation and action to be taken.

Indirect Pattern

- Make a general reference to the problem in subject line.
- Describe and establish credibility for the seriousness of the need or problem that your recommendation addresses.
- Discuss alternative solutions, beginning with the least likely to succeed.
- Present most promising alternative—your **recommendation**—last.

Indirect Pattern

- Show how the advantages of your recommendation outweigh its disadvantages.
- Summarize your recommendation and any action required.
- Ask for authorization to proceed if necessary.



Sample of Justification report on page 13 fig 9.7

FIGURE 9.7 Justification/Recommendation Report—Memo Format

SOUTHLAND TRUCKING, INC.

Interoffice Memo

Date: July 19, 200x
To: Christina Pearman, Vice President
From: Troy Barnwell, Operations Manager *T.B.*
Subject: Pilot Testing Smart Tires

Next to fuel, truck tires are our biggest operating cost. Last year we spent \$233,000 replacing and retreading tires for 495 trucks. This year the costs will be greater because prices have jumped at least 12 percent and because we have increased our fleet to 550 trucks. Tire warranties, wear, and retread histories are hard to track. To reduce our long-term costs and to improve our tracking system, I recommend that we do the following:

- Purchase 24 Goodyear smart tires
- Begin a one-year pilot test on four trucks

How Smart Tires Work

Smart tires have an embedded computer chip that monitors wear and performance. The chip also creates an electronic fingerprint for positive identification of a tire. By passing a handheld sensor next to the tire, we can learn where and when a tire was made (for warranty and other information), how much tread it had originally, and its serial number.

How Smart Tires Could Benefit Us

Although smart tires are initially more expensive than other tires, they could help us improve our operations and save us money in three ways:

1. **Retreads.** Goodyear believes that the wear data is so accurate that we should be able to retread every tire three times, instead of our current two times. If that is true, in one year we could save at least \$32,000 in new tire costs.
2. **Safety.** Accurate and accessible wear data should reduce the danger of blowouts and flat tires. Last year, drivers reported six blowouts.
3. **Record keeping and maintenance.** Smart tires could reduce our maintenance costs. Currently, we use an electric branding iron to mark serial numbers on new tires. Reading such data electronically could save us thousands of dollars in labor.

Summary and Action

Specifically, I recommend that you do the following:

- Authorize the special purchase of 24 Goodyear smart tires at \$450 each, plus one electronic sensor at \$1,200.
- Approve a one-year pilot test in our Atlanta territory that equips four trucks with smart tires and tracks their performance.

I hope you agree that our company would greatly benefit from pilot testing smart tires. Naturally, I would welcome any questions you may have.

Left-side callouts:

- Applies memo format for short, informal internal report (points to the memo header)
- Presents recommendations immediately (points to the recommendation paragraph)
- Justifies recommendations by explaining product and benefits (points to the 'How Smart Tires Work' and 'How Smart Tires Could Benefit Us' sections)
- Explains recommendations in more detail (points to the 'Summary and Action' section)

Right-side callouts:

- Introduces problem briefly (points to the introductory paragraph)
- Enumerates items for maximum impact and readability (points to the numbered list of benefits)
- Specifies action to be taken (points to the 'Summary and Action' section)

Tips for Memo Reports

- Use memo format for most short (eight or fewer pages) informal reports within an organization.
- Create side margins of 1 to 1¼ inches.
- Start the date 2 inches from the top or one blank line below the last line of the letterhead.
- Sign your initials on the **From** line.
- Use an informal, conversational style.
- For a receptive audience, put recommendations first.
- For an unreceptive audience, put recommendations last.

④ Feasibility Reports

Feasibility reports examine the practicality and advisability of following a course of action. For example, your company must decide whether to add a child-care facility.

Feasibility Reports

- Begin by announcing your decision immediately.
- Describe the background and problem necessitating the proposal.
- Discuss the benefits of the proposal.
- Describe any problems that may result.
- Calculate the costs associated with the proposal, if appropriate.
- Show the time frame necessary for implementation of the proposal.

Edited By:CAICAP.WEEBLY.COM

**BROWN ENGINEERING, INC.
MEMORANDUM**

Date: May 12, 200x
To: Eileen Heffernan, Vice President
From: Ashley Denton-Tait, Human Resources Manager *ADT*
Subject: Feasibility of an E-Mail and Internet Monitoring Program

The plan calling for implementing an employee e-mail and Internet monitoring program is workable and could be fully implemented by July 1. This report discusses the plan's background, benefits, problems, costs, and time frame.

Background: Current Misuse of E-Mail and the Internet. E-mail is efficient and cost-effective when used correctly. We allow employees Internet access for job-related tasks. However, we know that many employees are using their access for personal reasons, resulting in lowered productivity, higher costs, and a strain on our network. We hired an outside consultant who suggested an e-mail and Internet monitoring program.

Benefits of Plan: Appropriate Use of E-Mail and the Internet. The proposed plan calls for installing e-mail and Internet monitoring software such as EmployeeMonitoring, UltraView Plus, or Spector CNE. We would fully disclose to employees that this software will be monitoring their online activity. We will also teach employees what e-mail and Internet use is appropriate. In addition to increased productivity, lowered costs, and improved network performance, this software will produce numerous other benefits. It can help protect our company against loss of intellectual property, trade secrets, and confidential information. The software will limit any liability for sexual harassment, workplace harassment, or cyberstalking.

Employee Acceptance. One of the biggest problems will be convincing employees to accept this new policy without them feeling as if their privacy is being violated. However, our consultant can help us communicate the reasons for this policy in such a way that employees will understand its need. In addition, adequate training will help employees understand appropriate use of e-mail and the Internet on the job.

Costs. Implementing the monitoring plan involves two direct costs. The first is the initial software cost of \$400 to \$900, depending on the package we choose. The second cost involves employee training and trainer fees. Initial training will cost about \$1,000. However, the expenditures are within the budget planned for this project.

Time Frame. Selecting the software package will take about two weeks. Preparing a training program will require another three weeks. Once the program is started, I expect a breaking-in period of at least three months. By July 1 the e-mail and Internet monitoring program will be fully functional resulting in increased productivity, decreased costs, lowered liability, and improved network performance.

Please let me know by May 20 if you would like additional information about e-mail and Internet monitoring programs.

Outlines organization of the report

Reveals decision immediately

Describes problem and background

Evaluates positive and negative aspects of proposal objectively

Presents costs and schedule; omits unnecessary summary

Minutes of Meetings

Meeting minutes summarize the proceedings of a meeting.

Minutes of Meetings

- Include name of group, date, time, place, name of the meeting.
- List names of attendees and absentees.
- Describe disposition of previous minutes.
- Record old business, new business, announcements, and reports.
- Include the precise wording of motions.

Minutes of Meetings

- Record the vote and action taken.
- Conclude with the name and signature of the individual recording the minutes.



FIGURE 9.9 Minutes of Meeting—Report Format

*International Association of Administrative Professionals
Planning Committee Meeting
March 14, 200x, 10 a.m.
Conference Room B, Marriott Century Hotel*

Shows attendees and absentees → **Present:** Angel Bautista, Greg Goddard, Arnulfo Hernandez, Frank Huyten, Mila Roon, Ellen Schuster, Emeline Yong
Absent: Dan Galloway

Call to Order/Approval of Agenda/Approval of Minutes
The meeting was called to order by Chair Ellen Schuster at 10:05 a.m. The agenda was unanimously approved as distributed. Minutes from the February 1 meeting were read and approved. → **Notes approval of agenda and describes disposition of previous minutes**

Reports of Officers and Committees
Emeline Yong reported on convention exhibits and her desire to involve more companies and products during this year's international convention. Discussion followed regarding how this might be accomplished.
MOTION: That IAAP office staff develop a list of possible convention exhibitors. The list should be submitted at the next meeting. (Bautista/Huyten). PASSED 7-0.

Unfinished Business
Angel Bautista and Greg Goddard reviewed the information distributed at the last meeting about hotels for the Denver conference. Angel said that the Brown Palace Hotel has ample conference rooms and remodeled interiors. Greg reported that the Adams Mark Hotel also has fine banquet facilities, meeting facilities, and rooms at \$169 per night.
MOTION: To recommend that IAAP hold its International Convention at the Adams Mark Hotel in Denver, July 17–20, 2008. (Hernandez/Roon). PASSED 6-1. → **Highlights motions showing name of person making motion and person seconding it**

New Business
The chair announced three possible themes for the convention, all of which focused on technology and the changing role of administrative assistants. Frank Huyten suggested the title "Vision Without Boundaries." The chair appointed a subcommittee of Frank and Angel to bring to the next meeting two or three concrete theme ideas.
Greg Goddard thinks that IAAP should be doing more to help members stay ahead in the changing workplace. He suggested workshops to polish skills in word processing, project management, Web research, presentations, and scheduling software.
MOTION: To recommend to IAAP that it investigate offering fee-based technology workshops at the national and regional conventions. (Roon/Yong). PASSED 5-2.

Adjournment
There being no further business, it was moved, seconded, and carried that the meeting be adjourned. The meeting was adjourned at 11:50 a.m. by Ellen Schuster. The next meeting will be held on April 15 at 10 a.m. at the Marriott Century Hotel.
Respectfully submitted,
Greg Goddard → **Shows name and signature of person recording minutes**
Greg Goddard, Secretary

Summarizes discussion; does not record every word

Summarizes new business and announcements

Records meeting adjournment and next meeting date

FIGURE 9.10 Action Item List for Meeting Minutes

Organizations may include a list of action items as part of their minutes so that individuals know what task has been assigned to whom. This list can later be used to track task completion. Fairway Property Management is investigating pest control methods for a large group of apartments and condominiums. The table below was generated in MS Excel to allow easy sorting by due date or other variables.

FAIRWAY PROPERTY MANAGEMENT						
TERMITE ABATEMENT ACTION ITEMS/OPEN ISSUES						
Sorted by due date			Last Update 6/14/09 6:00 p.m. Hassan			
No.	Item	Date	Who	Status	Date completed	
1	Review traditional methods of termite abatement, their pros/cons	6/15/09	Erin to summarize findings	Done Will be distributed at meeting on 6/20	6/4/09	
2	Investigate alternative pest control methods and their efficacy in large apartment complexes	6/15/09	Bob	Done Will report on 6/20	6/14/09	
3	Contact at least two independent research chemists about Vikane residue	6/15/09	Erin	Waiting for callback		
4	Research consumer information and resources	6/15/09	Hassan			
5	Search for government sources and information	6/15/09	Chris	CLOSED: none found	6/10/09	
6	Call at least five termite control companies for bids; request large-volume discounts, long term	7/2/09	Chris			

Shows numbered action items with descriptions

Lists names of members responsible for tasks

Indicates dates when tasks were assigned

Identifies dates when tasks were completed

Summaries

- Present the goal or purpose of the document being summarized.
- Highlight the research methods (if appropriate), findings, conclusions, and recommendations.
- Omit illustrations, examples, and references.
- Organize for readability by including headings and bulleted or enumerated lists.
- Include your reactions or an overall evaluation of the document if asked to do so.

Mary Ellen Guffey, *Essentials of Business Communication, 8e*

Chapter 9, Slide 41

Summaries

Summaries compress data from a longer publication, such as a business report, a magazine article, or a book chapter.

Mary Ellen Guffey, *Essentials of Business Communication, 8e*

Chapter 9, Slide 40

FIGURE 9.11 Executive Summary (excerpt from business plan)

EXECUTIVE SUMMARY

Bluewater Koi Expansion Plan

Summarizes purpose of longer report

The purpose of this business plan is to acquaint venture capitalists with Bluewater Koi fish farm and to solicit support for an expansion plan to be undertaken over the next two years. This report will do the following:

- Profile the current Bluewater Koi operation
- Explain the need for expansion to meet market demands
- Summarize expansion costs and expected payback

Uses headings to improve readability

Business Profile

Bluewater Creek is a 45-acre ornamental fish farm located in South Alabama. Bluewater specializes in breeding and selling koi, which are exotic and beautifully colored carp developed in Japan. Koi are collected by hobbyists and usually live in lushly landscaped fish ponds indoors or outside. Although a grand champion koi in Asia has sold for over a million dollars, the koi sold at Bluewater Creek range in price from \$2.20 to \$90 each. Bluewater had total sales of \$347,000 last year in its retail and wholesale operations. The fish at Bluewater are grown in five surface ponds, and the operation ranges from breeding to shipping.

Provides overview of main points

Follows sequence of longer report

Expansion to Meet Market Demands

Bluewater has enjoyed increasing sales and profits since its inception as a fish hatchery in 1981. It has developed a large clientele, selling to retailers and wholesalers through its print catalog and its Web site. Fish quality and health are of utmost importance at Bluewater. Because koi are susceptible to viruses, Bluewater has adopted a policy of not buying or reselling fish from other U.S. growers. As a result, all Bluewater koi are bred and grown on-site. This policy, coupled with constantly increasing sales, makes it necessary to acquire a 9-acre farm to accommodate three additional growing ponds.

Financial Needs and Payback

Acquiring the 9-acre farm is expected to cost \$38,000. An additional \$12,000 is needed to move 60,000 cubic yards of earth to enable the ponds to reach the natural water table necessary for maintaining water levels in the ponds. Other expenses include \$22,000 to expand the breeding operation, which involves matching high-quality male and female brood fish imported from Japan. Artificial spawning yields high hatching rates. But this practice is labor intensive. Equally laborious is the following culling process in which only the best colored, patterned, and conformed fish are kept. A total investment of \$72,000 will enable Bluewater to complete its needed expansion. Projected annual sales and costs indicate that Bluewater should be able to repay the loan in five years.

Focuses on most important parts of business plan, including marketing, finances, and payback