

# Revision Checklist: 310 Formal Report

Use this checklist to revise and proofread. You may mark comments using the numbers from the “Assignment Corrections” sheets if you like. (See numbers in parentheses below.) **Note:** for help with *Word* formatting, see directions on my website.

## DOCUMENT DESIGN AND FORMATTING

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### Overall Document

- no text smaller than 12 pt.(even on visuals) (F1)
- Times or Times New Roman font, 12-point minimum (F1)
- clear, specific, grammatically and visually parallel headings (H2)
- underlining not used for highlighting (F6)
- no single subheadings or single bullets
- headings clearly visually connected to text (more space before than after, not separated by page breaks) (H3)
- text under all headings (H7)
- 5 page limit
- single spaced, with double spacing between paragraphs
- any visuals: figure #, title, and text introduction—ex: see Figure 1, p. 6 (V2), plus a source citation at the bottom of the visual
- bullets for lists—not hyphens (L1)
- page numbers
- headings and subheadings in bold
- double space between paragraphs, single space within paragraphs
- no folder or binding except for a staple

### Transmittal Letter (correct standard business letter format)

- paperclipped to the front of the report
- addresses
  - use your address for the return address—not Cal Poly
  - use the company’s address for the inside address
- salutation: address the report to the CEO of the company
- signature block
- date
- single spaced, with double spacing between paragraphs
- correct standard format (without letterhead)

### Title Page

- title of report (along with company name and an indication of the type of report)
- release date
- author’s name
- name and job title of primary reader

## CONTENT

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### Overall Document

- attention to the readers’ needs
- clear, concise, detailed discussion
- key words in all headings (H1)
- in-text citations as needed (8)
- sections understandable without looking at the headings (H8)
- ad language strictly avoided (R5)
- tone consistent throughout
- accurate facts and figures (as far as you can tell)

### Transmittal Letter

- attention to the audience’s needs (president of the company)
- you-attitude
- explicit purpose statement
- brief overview of the report contents
- explicit action for the reader to take

### Introduction

- purpose of report
- name of the company (but remember you are writing to them)
- needed definitions included
- overview of the report contents (name problem, cause(s), solution(s))
- research methods

### Body

- description of the problem
- explanation of causes
- plan for solving the problem
- suggested schedule in table form
- suggested budget in table form
- concrete, detailed examples/support for all general statements

### Conclusion/Recommendation

- cost/benefit analysis
- conclusion logically based on evidence (7)
- brief summary of findings
- recommendation
- explicit action for readers to take (R7)

### Source List (always first appendix if document has no glossary)

- APA format
- minimum 8 sources (remember the A-paper has print, internet, and empirical sources)

## STYLE AND MECHANICS

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### Mechanics

- correct spelling and mechanics
- consistent spellings of unusual words like brand names
- correct grammar
- correct punctuation
- correct usage and avoidance of clichés
- little to no direct quotation
- quotations, if used, correctly punctuated and introduced
- colons correctly used to introduce lists (Co)
- the word *you* only used to refer directly to a reader (GY)
- “optional” comma included in lists (only if not using bullets)
- \$, *lbs.*, <sup>TM</sup>, ©, and so on used as needed
- numbers written out if only one word and not a number you think your reader might be scanning for. You will also write out any number that occurs at the start of a sentence.

### Style

- *be*-forms avoided as much as possible (circle any *be*-forms you see)
- extra words avoided (underline any you find)
- reasonable sentence length without too much embedding
- expletives avoided
- sexist language avoided
- all style advice in the text and lecture followed