

# Checklist for Review of Formal Report

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I will look for the following items in your final drafts. You can find a copy of this list on my website.

## Items Due

Turn in the following on the last day of regular class:

- ↪ two spiral bound copies of the report (one for me and one for your primary reader)
- ↪ your yellow doc specs & outline with my comments (tucked into the back of my copy, not bound in)
- ↪ a 9"x12" mailing envelope with the primary reader's address and the specific return address of one of the group members
- ↪ postage for the primary reader's copy (get it weighed to save money, or use Priority Mail rate: \$4.05)

## Letter of Transmittal

Your letter of transmittal will need the following:

- ↪ standard business letter format
- ↪ a one-page limit
- ↪ a brief introduction to the report
- ↪ a statement of the envelope contents
- ↪ brief summary of the report (less than three sentences)
- ↪ any helpful information not in the report
- ↪ an explicit action for your reader to take
- ↪ a paperclip attaching the letter to the cover of the primary reader's copy
- ↪ a second copy of the letter paperclipped behind the memo on my copy
- ↪ team logo

## Memo of Transmittal

Your memo of transmittal may resemble the letter of transmittal fairly closely. You do not need a copy of it in the primary reader's copy. The memo will have

- ↪ standard memo format
- ↪ a one-page limit
- ↪ the same information as the letter of transmittal but tailored for me
- ↪ a paperclip attaching it to my copy of the report

## Cover

The cover must include the following information:

- ↪ a title with key words and organizational markers
- ↪ the name and title of the primary reader
- ↪ the date
- ↪ the authors' names and titles
- ↪ spiral binding with plastic or heavy paper covers
- ↪ team logo

**Title Page** (same information as cover)

If you use a clear plastic cover, the cover will serve as the title page also. If you use an opaque cover, you will need to repeat the cover information on a separate title page.

**Informational Abstract or Executive Summary**

Include the following:

- ↪ a label (*Informational Abstract* or *Executive Summary*) on top
- ↪ the purpose of the report
- ↪ the scope (options and criteria lists)
- ↪ research methods (types of sources)
- ↪ definitions as needed
- ↪ paragraph form with appropriate headings and bullets
- ↪ attention to the reader's needs
- ↪ the abstract placed before the table of contents  
OR the executive summary placed after the list of tables and figures
- ↪ brief findings

**Table of Contents**

Make sure your table of contents has

- ↪ informational headings (include options and criteria levels)
- ↪ headings matched exactly with body headings
- ↪ page numbers
- ↪ ellipses
- ↪ a two-page limit
- ↪ a label (*Table of Contents* or *Contents*)

**List of Tables and Figures** (combined or in two lists)

Check for

- ↪ informational titles
- ↪ titles matched exactly with the titles in the body
- ↪ page numbers
- ↪ ellipses
- ↪ a label or labels
- ↪ placement directly after the table of contents

**Introduction** (not necessarily in this order; some items may overlap)

Include the following in your introduction:

- ↪ the topic
- ↪ the purpose or significance of your report
- ↪ the scope (plan or overview)
  - ↪ the minimum specifications list (descriptions as needed)
  - ↪ the criteria list with a description of each criterion
  - ↪ the options list
- ↪ appropriate subheadings

- ↪ definitions and descriptions as needed
- ↪ history, theory, background as needed
- ↪ sources (research used)
- ↪ attention to reader's needs

## **Body**

The body will provide

- ↪ clear, complete, organized, and consistent discussion of each option
- ↪ in-text citations for all borrowed facts, figures, and tables—use the APA format: (see appendixes in text)
- ↪ headings and subheadings matched with the criteria list in the introduction and the summary table in the conclusion
- ↪ as few abbreviations as possible
- ↪ direct quotes rarely, if ever, used
- ↪ full paragraphs with bullets and tables as needed

## **Tables and Figures**

Each visual requires

- ↪ interpretation and summarization in the text
- ↪ a figure number and location reference in the text (ex: See Figure 2 below.)
- ↪ a figure or table number along with an informational title
- ↪ parts labeled as needed
- ↪ the source documented at the bottom
- ↪ placement as close as possible to the text reference
- ↪ placement and formatting consistent with other visuals

## **Document Design**

Make sure your document has the following elements:

- ↪ headers and/or footers, justified right, indicating page contents (option level in the body)
- ↪ single spacing
- ↪ serif font for the body (a consistent style throughout)
- ↪ text printed on one side of the paper only
- ↪ 12 point Times or Times New Roman font for all text (headings can be larger)
- ↪ page numbers (justified right or centered at the bottom)
- ↪ headings clearly indicating hierarchical level and contents (don't forget high level headings for the introduction, body, and conclusion)
- ↪ text under every heading
- ↪ avoidance of underlining and italics for highlighting
- ↪ consistent and effective use of design elements: fonts, rules, white space, and other formatting
- ↪ hyphens not used for bullets

## **Conclusions**

Include the following in your conclusion:

- ↪ a discussion of results/recommendations
- ↪ consistent logic
- ↪ a final, single choice
- ↪ subheadings (criteria or options)
- ↪ an explicit action for your primary reader to take
- ↪ the summary table (filled in skeleton table from the detailed outline) included and referenced in the text

### **Back Matter**

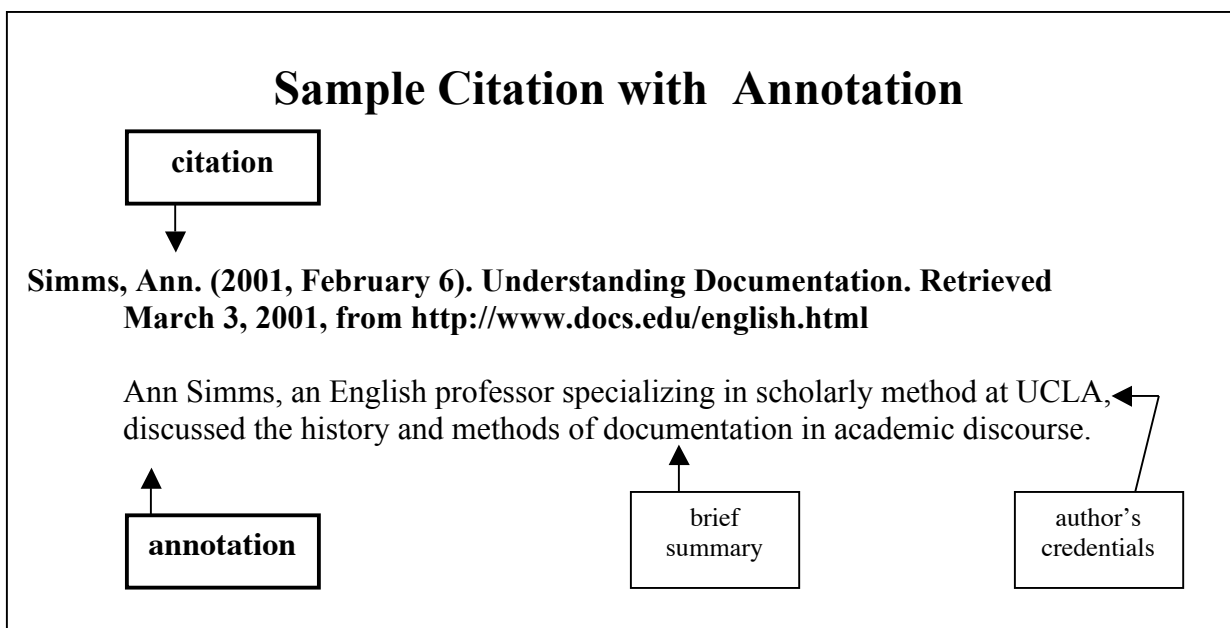
Back matter consists of the following:

- ↪ a glossary (if needed)
- ↪ the references list in APA format (always first after the glossary). Eight minimum as follows:
  - ↪ a minimum of four empirical sources (include interviews so you can annotate them: use the MLA format, see appendixes in text)
  - ↪ two print sources
  - ↪ two electronic sources
  - ↪ annotations for each source (the credentials of the author/source plus a brief summary of the information you obtained there)—see sample in box below
- ↪ any additional information you may want to include which does not fit appropriately in the body of the report

### **\*REMINDER**

REREAD THE FOLLOWING BEFORE FINAL TYPING:

- ↪ Class notes and text readings on style
- ↪ “Trade and Grade” worksheets (on my website)
- ↪ “Assignment Corrections” handout (on my website)
- ↪ “Common Mechanics Issues in Tech Writing” handout (on my website)



**☛ Remember to make all of the changes your peers have marked on the draft and discussed with you in conference!**