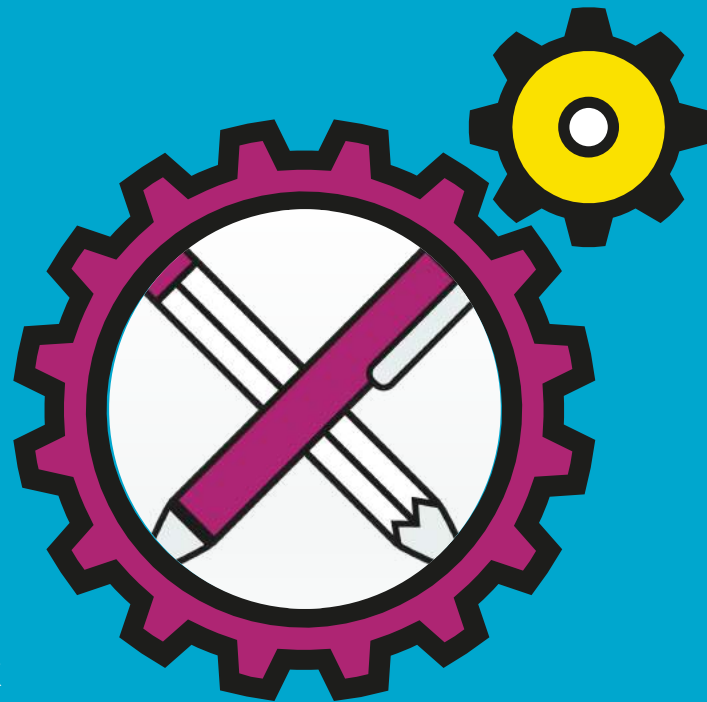# Report Writing

Fundamentals

Caroline and Mark

Caroline@nhselect.org.uk and mark@nhselect.org.uk

About
NHS Elect

Helping individuals, teams and organisations in health and care to thrive.

National NHS organisation

90 members

Training, consultancy and coaching

Over 120 free webinars, online courses, networks and resources

Check out our website
www.nhselect.nhs.uk

Up to 12 free webinars a month!

27th June	7 Steps to Measurement for Improvement	2.00pm
28th June	Intro to Process Mapping	9.30am
1st July	If Disney ran your hospital by Fred Lee	2.30pm
1st July	Effective Communication for Teams	2.30pm
2nd July	Time management	2.00pm
3rd July	Minute Taking	2.00pm
4th July	Finance for non-finance people	9.30am

Book online

Book in the members' section of
www.nhselect.nhs.uk
under 'Webinars'

Email:
events@nhselectevents.org.uk
with any queries

Questions to Consider (Pop Your Thoughts In The Chat)

1. In your job, what is the main type of report that you have to write?

2. Is there anything that worries you/puts you off about writing reports?

3. If you were writing a report, what would you need to do to make sure no one wanted to ever read one of your reports ever again!

Types of Reports

Information	Proposal	Research
Reports to monitor & control operations *Provide feedback and other information for decision-making*	**Internal Proposals** *Request decisions from managers within the organisation*	**Reports to Assess Opportunities** Explain risk and rewards of a course of action
Reports to implement policies & procedures *Communicate organisational rules and positions*	**External Proposals** Request decisions from outside the organisation	**Reports to Solve Problems** *Analyse problems and (usually) suggest solutions*
Reports to demonstrate compliance *Provide information to show regulators & other authorities that organisation meets requirements*		**Reports to Support Decisions** *Judge the merit of past or future decisions*
Reports to Document Progress *Provide managers or customers with information updates*		

What They Include / Typical Formats

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INFORMATION	PROPOSAL	RESEARCH
Title Page	Title Page	Title Page
Executive Summary	Executive Summary	Abstract
Contents and tables of figures and diagrams	Contents and tables of figures and diagrams	Contents and tables of figures and diagrams
Purpose of the report (objective)	Purpose of the report (objective)	Purpose of the report (objective)
Introduction	Introduction	Introduction
Categories of Information	Problem Statement	Method
	Options Appraisal	Results
Summary	Proposal	Conclusion
Index*	Index*	Index*
Bibliography *(if required)*	Bibliography *(if required)*	Bibliography *(if required)*

What questions should you be asking of the person asking you to write the report?

Good Questions to Ask

- 📖 The terms of reference (definition of the task) or precise purpose of the report

- ❓ The reason why the report is needed

- 📚 Who will be reading the report?

- 📄 The type of report it should be

- ✓ The scope of the subject that is to be covered

- ⧗ The time scale.

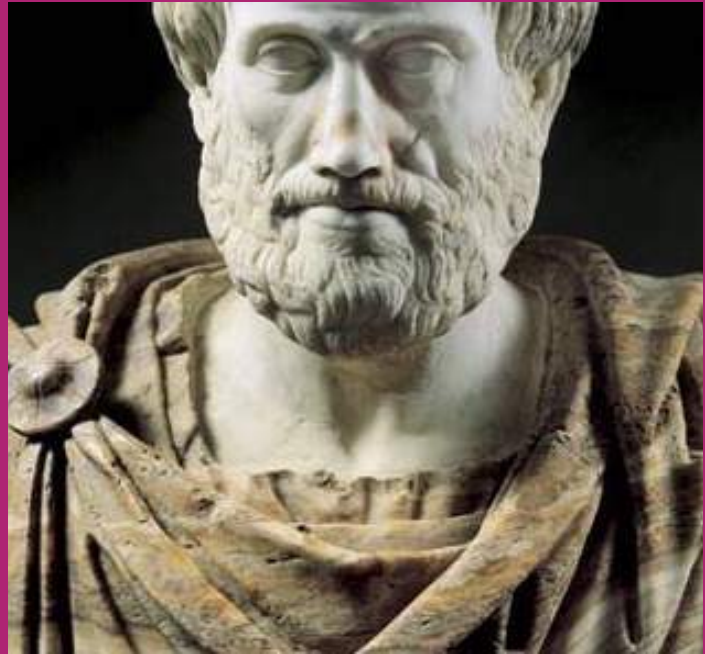# What Do They Know – What Don't They Know

What They Know - Reference

What They Don't Know - Explain

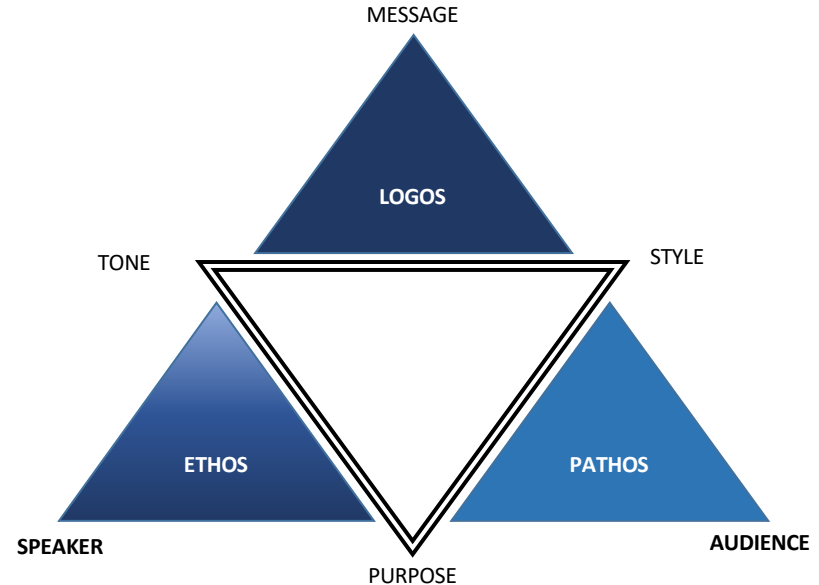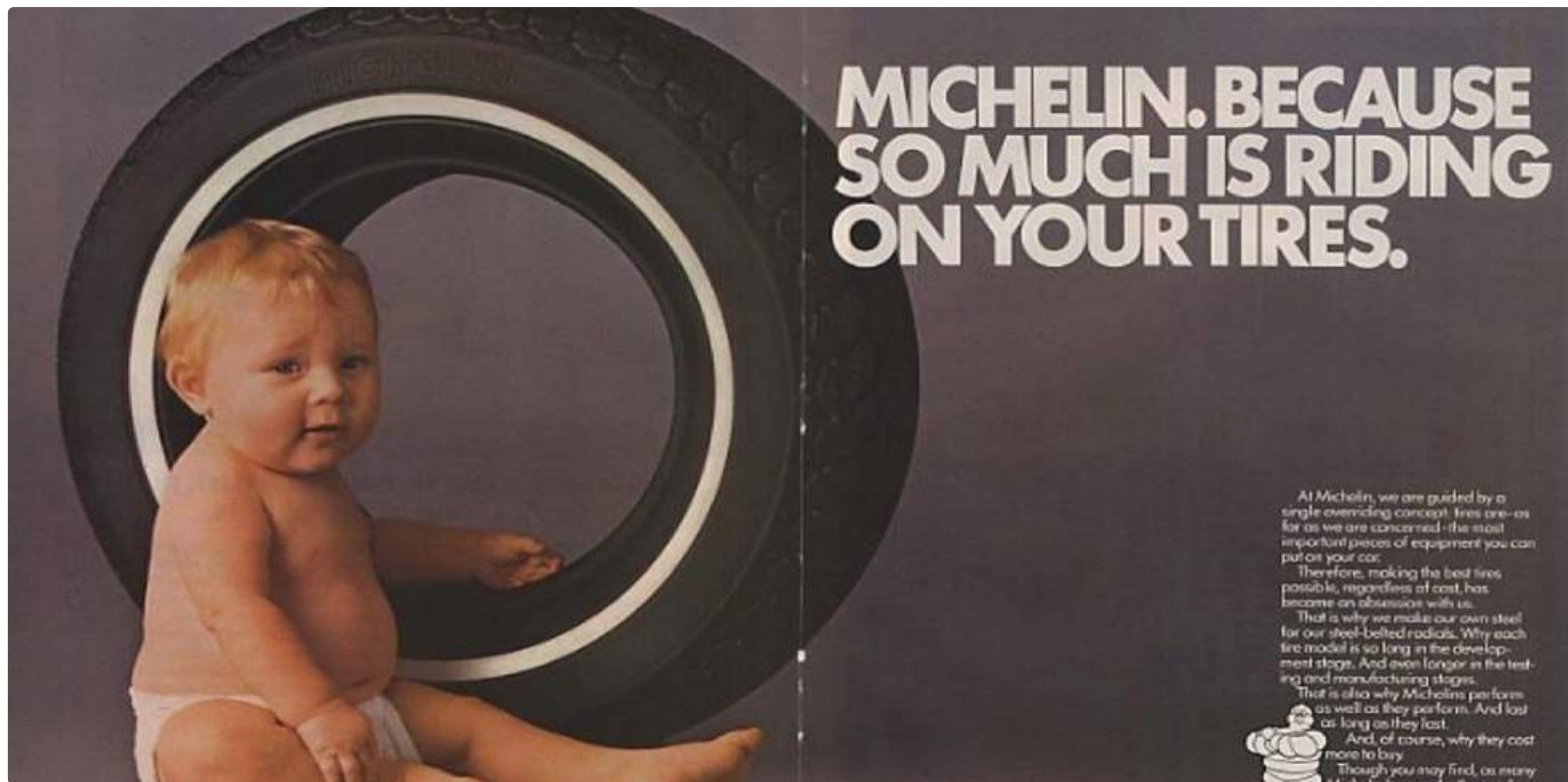|	
P	**POINT:** Outline your main point/topic for this paragraph
E	**EVIDENCE:** Support your point with evidence and examples
E	**EXPLANATION:** Explain how this evidence supports your answer
L	**LINK:** Refer this point back to the question, integrating key words where possible/appropriate

Rhetorical Triangle

- What is said (message)
- Who is saying it (speaker)
- Who is listening (audience)
- Where / when it is being said (context, appeals)
- Why it is being said (purpose)
- How it is being said (tone, style)

MESSAGE

LOGOS

TONE   STYLE

ETHOS   PATHOS

SPEAKER   AUDIENCE

PURPOSE

Pathos

MICHELIN. BECAUSE SO MUCH IS RIDING ON YOUR TIRES.

Pathos

- Pathos: an appeal to emotion.

- Sometimes, it is a positive emotion such as happiness: an image of people enjoying themselves while drinking Pepsi. Other times, advertisers will use negative emotions such as pain: a person having back problems after buying the "wrong" mattress.

- Pathos can also include emotions such as fear and guilt: images of a starving child persuade you to send money.

Iconic Use of Pathos

https://vimeo.com/155326135

What Do you Notice About This Speech

I still have a dream. It is a dream deeply rooted in the American dream.

I have a dream that one day this nation will rise up and live out the true meaning of its creed: "We hold these truths to be self-evident; that all men are created equal."

I have a dream that one day on the red hills of Georgia the sons of former slaves and the sons of former slave owners will be able to sit down together at the table of brotherhood.

I have a dream that one day even the state of Mississippi, a state sweltering with the heat of injustice, sweltering with the heat of oppression, will be transformed into an oasis of freedom and justice.

I have a dream that my four little children will one day live in a nation where they will not be judged by the colour of their skin but by the content of their character.

I have a dream today.

Pathos – And Much More

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I have a dream today.

Influencing Lessons From Matin Luther King

- Align to the values and objectives of the trust, and or the individuals
- Let them choose, appealing to their good self / reasoning when you can
  - He invites with the use of I – and avoids criticising / blaming
- Question pitch: if the answer is in your favour, pose it as a question
- Story telling can help – tell them about the past, the present and the future
- Help them feel what it is like - be there (imagineering)
- Use emotion overtly and covertly (but alongside evidence - logos)
- Communicate, communicate, communicate (tell them, tell them again, tell them some more….)

What Do These All Have In Common?

- I have a dream
- Stop, look and listen
- Just Do It
- Have a Break
- Britain's Favourit...
- Location...
- Liberty, ...nity
- Reuse, re..., recycle

THE RULE OF 3

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Logos

- Logos: an appeal to logic or reason.

- Logos will typically give you the evidence and statistics you need to fully understand what the service, proposal, or idea does, or the facts about the situation and options (dispassionate assessment) are

- In advertising, logos is often used to give people t "straight facts" about the product: One glass of Tropicana orange juice contains 75% of your daily Vitamin C needs.

- But can be used more subtly and often works bett when seeking to influence when writing reports…

4 out of 5 women take up their smear test invitation.

Don't delay booking yours.

Smear tests save lives.

0808 802 8000

Ethos

- Using people of authority, appeal, credibility or character

- Advertising: convincing you company is reliable, honest, and credible

- Statistics from reliable experts

- A celebrity endorses a product

- TEST: George Clooney advertises …?
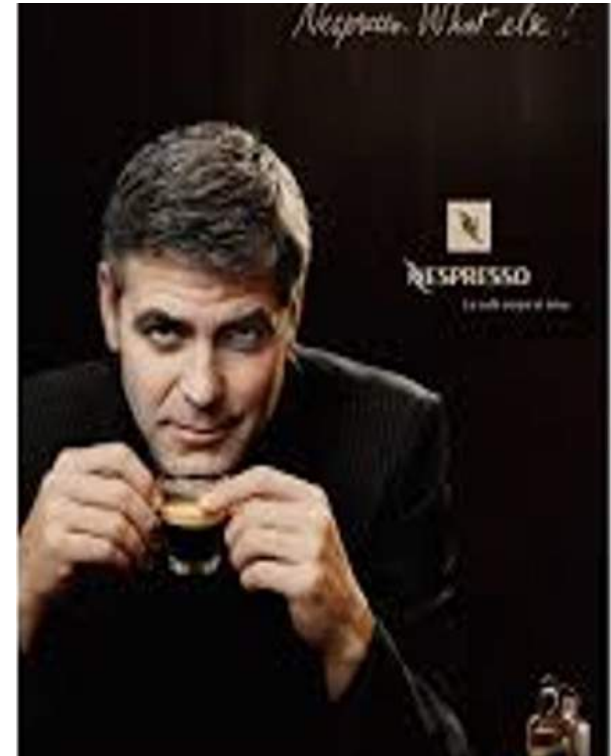
Hearts as Minds

It will depend on the audience preferences, but as a general rule, a mixture of pathos (emotion), and logos (evidence) is a good basis to work from.
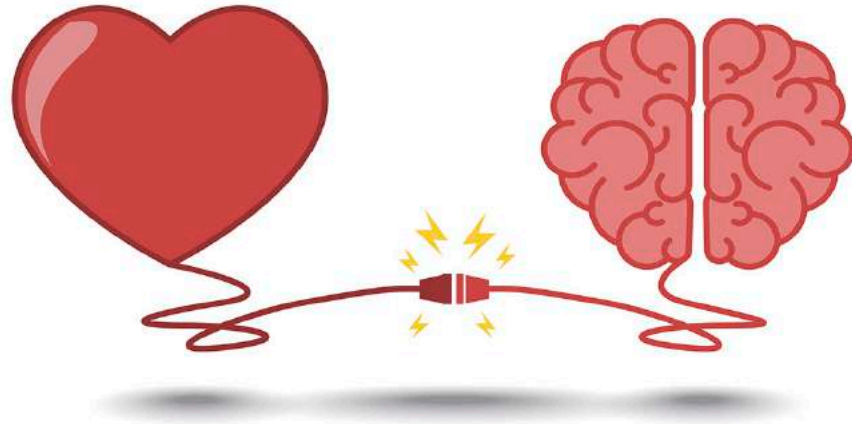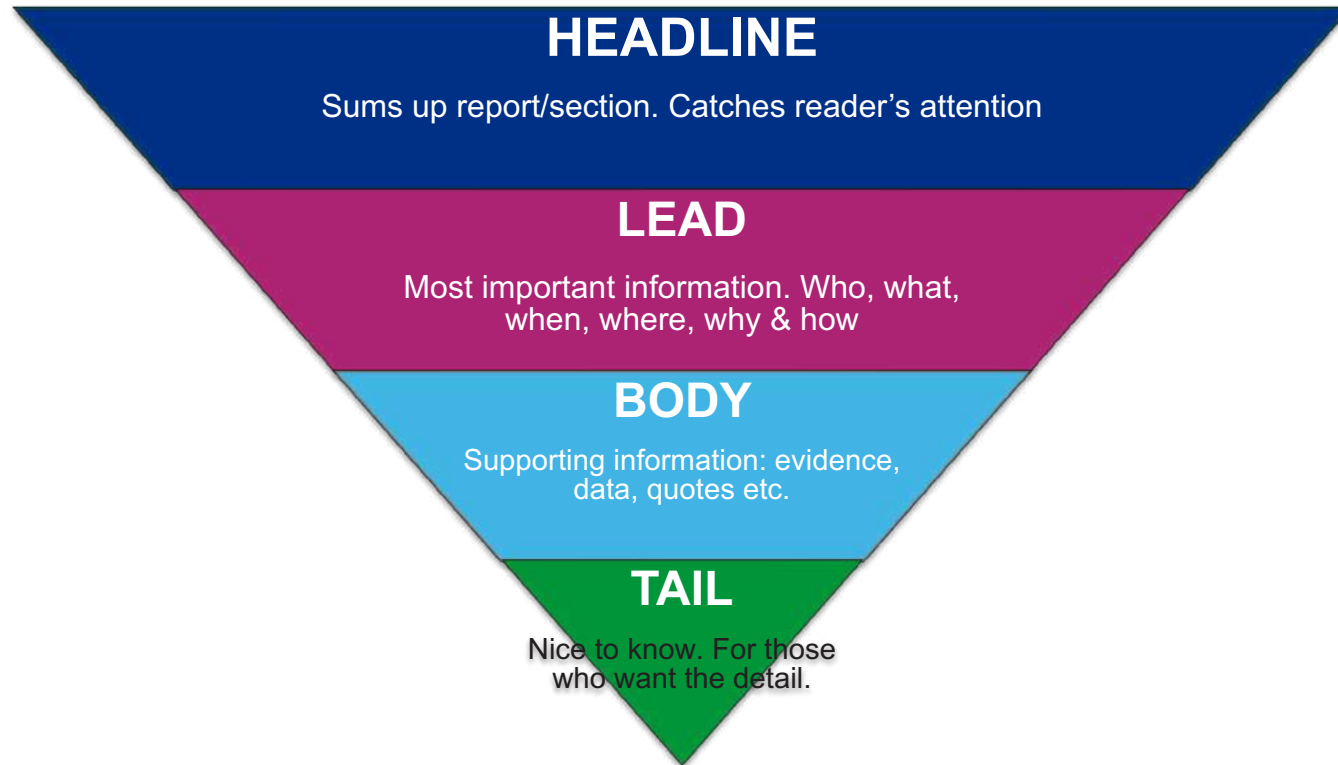
BLOT – Bottom Line On Top

Bottom

Line

On

Top

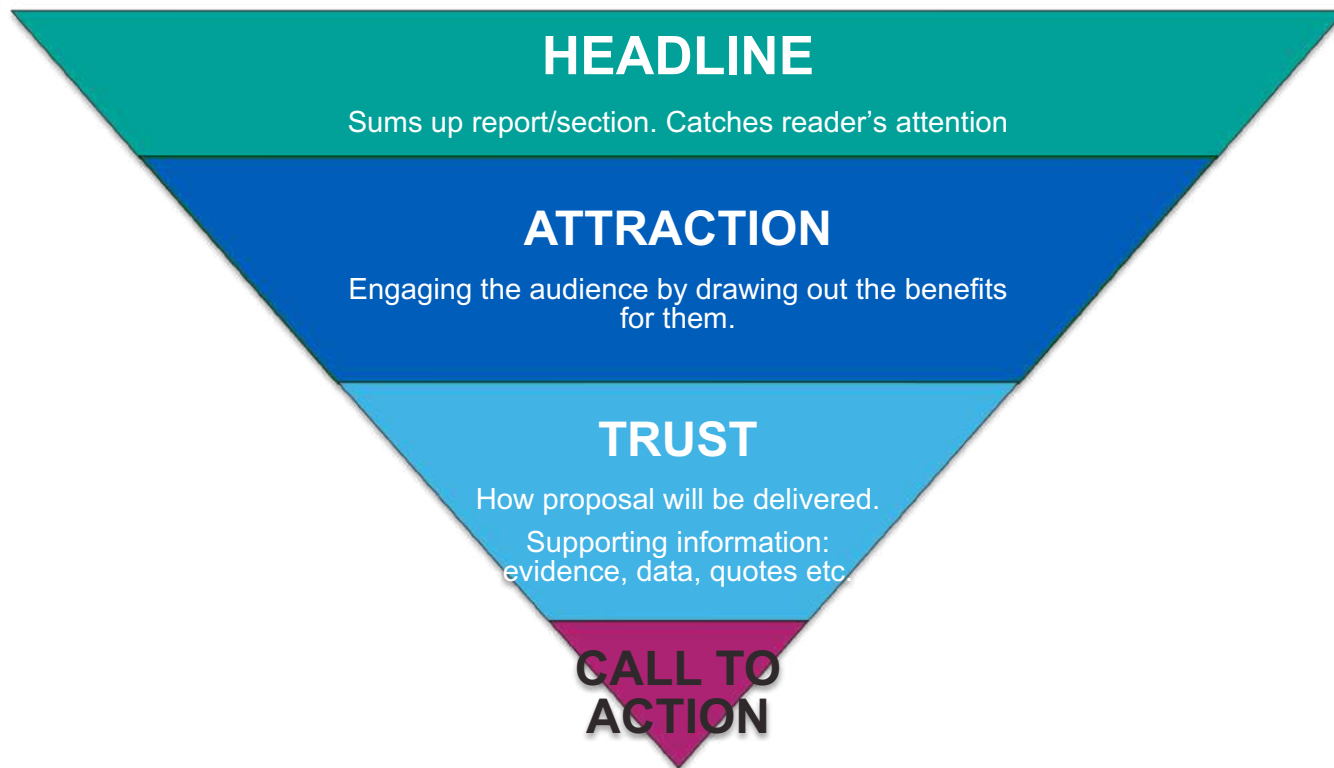# Journalist Triangle – Information

Journalist Triangle – Information

Quake Hits Greek Island **(Headline)**

A strong earthquake shook the seabed off the southern island of Crete on Thursday, but there were no reports of damage or injuries. **(LEAD)**

The Athens Geodynamic Institute said the undersea quake had a preliminary magnitude of 5 and its epicentre was 220 miles south of Athens. The quake occurred at 8:51 a.m. Earlier, another quake with a preliminary magnitude of 4.4 occurred offshore in the Aegean Sea about 213 miles northeast of Athens. No injuries or damage were reported from the moderate tremor, which struck at 2:03 a.m. near the island Samothrace.**(BODY)**

A quake of magnitude 2.5 to 3 is the smallest generally felt by people. A quake of magnitude 4 often causes slight damage. Magnitude 5 can produce moderate damage. **(TAIL)**

Copywriters Triangle – Proposal

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HEADLINE
Sums up report/section. Catches reader's attention

ATTRACTION
Engaging the audience by drawing out the benefits for them.

TRUST
How proposal will be delivered.

Supporting information: evidence, data, quotes etc.

CALL TO ACTION

Reports You May Come Across

Board Reports

- Who are they for ?

- How long should they be?

Board Papers – Some Simple Guidelines

- Strategic – high level (drill down supplementary reports for additional information / back-up)

- Brings the Board up to speed – chance for Board to ask questions

- Encourage success, sense of pride and action

- Highlights Board's accountability

- Sense of alignment (or otherwise) to vision and how performing (Critical Success Factors in particular)

- Often just a couple of pages (supplementary reading may be attached or available elsewhere)

- Unless below the line (considered confidential) – can be viewed widely

Root cause and Investigative Reports: Questions To Consider

1. What is their purpose and who are they for?

2. What content would you typically include?

Root cause – good practice & content

- Informs those affected by events

- What happened, when and why

- Highlights risk and development

- Learning and improvements

- Simple as possible

- Objective and free from bias

- Corrective actions

- Timeline
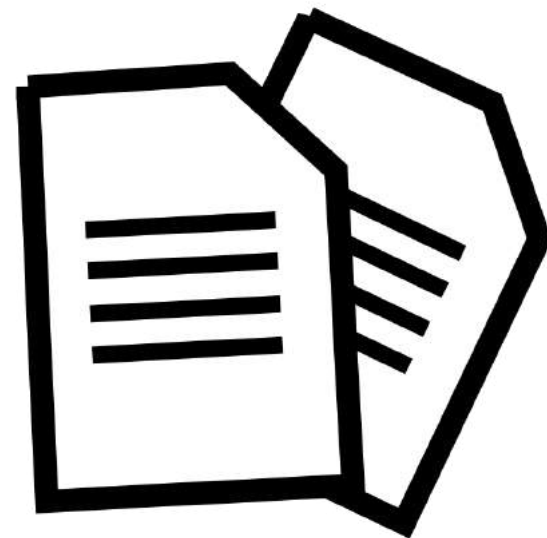
Example: Internal incident review report

- 1 or 2 sides
- Incident description and how managed
- Actions taken to mitigate risks
- Assurance that action was appropriate, including making patient and situation safe
- Additional information

Example: Investigation report

- Executive summary
- Terms of reference
- Background
- Duty of candour
- Involvement & support of staff
- Investigation report, including
  - Conclusion
  - Recommendations

SMT / Management Monthly:

- What is the purpose of performance reports (SMT, Monthly Management Reviews, etc.)?
- Who are they for?
- What would you expect to see on one?
- What wouldn't you expect to see and why?
- What are the greatest challenges when compiling performance reports?
- What would be your list of "don't do's" – any examples of ones that you felt were not effective and why
- What would be you list of "do do's"

Performance (E.g. Monthly SMT) Reports

- Key, critical information provided to people interested in the performance of the Department, Division, Trust or body (internal and often external)
  - Helps accountability within department, division, and trust
- Management by exception – allows interested parties to see what is happening quickly, and where focus needs to be directed
  - Poor performance obviously, but also high performance to ensure it is not at the expense of something else, and if it isn't, to capture and share the learning
- Chance to celebrate success and encourage team to continue and do more of it
- Report should be kept as simple as possible to ensure it is simple, quick and easy to understand by most readers
- Should at all times be objective and free from bias – focused on demonstrating (or otherwise) control and congruence in respect of relevant objectives, outcomes and critical success factors

Operate an Enquiring Mind

Business reporting is not dealing with objects, it is dealing with relationships between objects.

Hasso Plattner

Co-Founder SAP

What are we telling them and why?

Real Life Example: Serious Incidents Section On A Trust's Management Monthly Report

Full extract from a section of a trust's health and safety section in their monthly SMT report:

SERIOUS INCIDENTS
Serious Incidents have shown a positive reduction from 3 to 1 this month.

Thoughts in groups regarding this statement, in particular:

1. What does it tell you?
2. What doesn't it tell you?
3. What is being gained and / or lost by this?

Style

Look and Sound

Plain language

- Plain words and phrases
- Specific action words
- Active voice
- Strike out useless words
- Avoid large blocks text
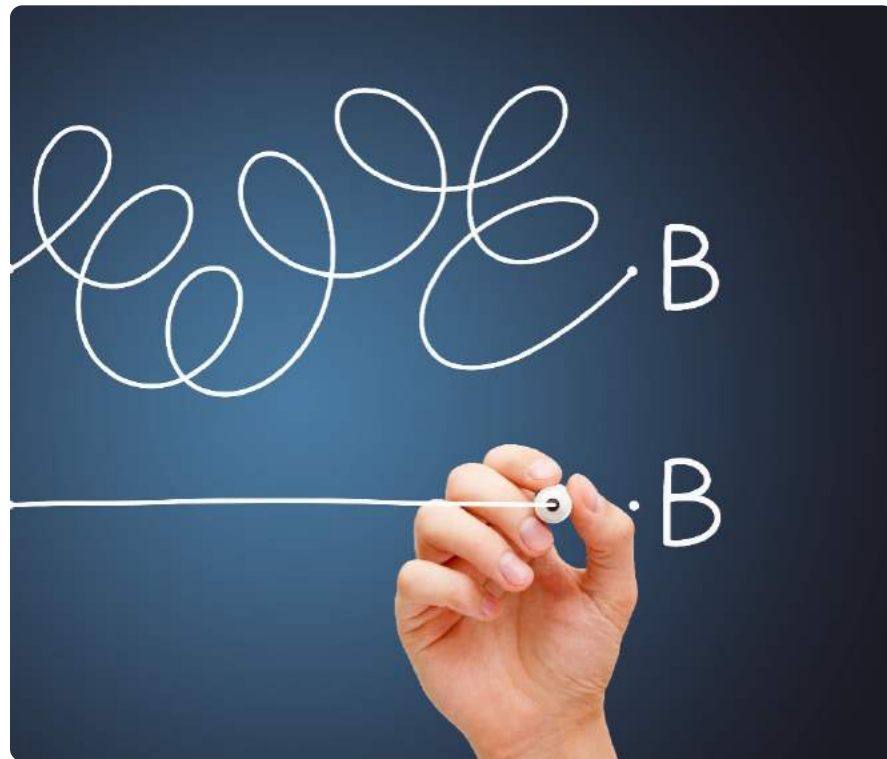
Making Things Simple

additional		as a consequence of	
anticipate		at the present time	
ascertain		due to the fact that	
correspondence		in accordance with	
discontinue		in the event that	
endeavour		on behalf of	
establish		prior to	
nevertheless		taking into consideration	
notify		with reference to	
subsequently			

Simple is Best

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additional	more
anticipate	expect
ascertain	find out
correspondence	letter/email
discontinue	stop
endeavour	try
establish	find out
nevertheless	but
notify	tell
subsequently	later

as a consequence of	because
at the present time	now
due to the fact that	because
in accordance with	in line with
in the event that	if
on behalf of	for
prior to	before
taking into consideration	considering
with reference to	about

Question to consider

Which buzzword to you dislike the most?
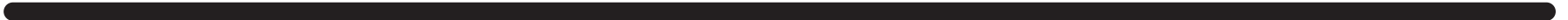
Buzzwords to Think About Avoiding

- agenda
- agile
- collaborate
- commit & pledge
- deliver
- dialogue
- empower
- foster
- key
- leverage

- liaise
- overarching
- progress verb
- promote
- robust
- streamline
- strengthening
- tackling
- transformation
- triangulate

Redundancies

Redundancy is when you use more words than necessary to express something, especially words and/or phrases in the same sentence that mean the same thing

SAFETY WARNING!

Opening this box will result in Death by Electrocution & a €50 Fine.

Strike out useless words

Unfortunately the surgeon's operating lists were cancelled on the day of the appointment as he was unwell and the Trust is sorry if the patient was not notified before they left the clinic. Unfortunately the patient left before another appointment could be arranged.

Strike out useless words

~~Unfortunately~~ the ~~surgeon's~~ operating lists were cancelled on the day of the appointment ~~as he was unwell~~ and the Trust is sorry ~~if~~ the patient was not notified ~~before they left the clinic~~. ~~Unfortunately the patient left before another appointment could be arranged~~.

Strike out useless words

Now:

The operating lists were cancelled on the day of the appointment and the Trust is sorry the patient was not notified.

Before:

Unfortunately the surgeon's operating lists were cancelled on the day of the appointment as he was unwell and the Trust is sorry if the patient was not notified before they left the clinic. Unfortunately the patient left before another appointment could be arranged.

Nominalisation

We take a perfectly good verb and mangle it into a noun.

NHS Examples:

- Transformation
- Integration
- Digitisation

Our strategy is integration delivered through transformation

Our strategy is to integrate *(what?)* by transforming *(how?)*

Passive & active voice

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The doctor completed the procedure

subject   verb   object

The procedure was completed by the doctor

object   verb   subject

When to use the passive voice

- To make something less hostile
  - Active: You have not paid this bill
  - Passive: This bill has not been paid
  - Active: We have not received payment

- When you don't know who the subject is
  - The area was vandalised
- To avoid blame
  - Active: He made a mistake
  - Passive: A mistake was made

Avoid large blocks text

- 1 idea per sentence

- Maximum sentence length 12-20 words

- 1 topic per paragraph

- 5 sentences per paragraph maximum

- Reports: headings, numbering and bullet points

Using diagrams and graphs in reports
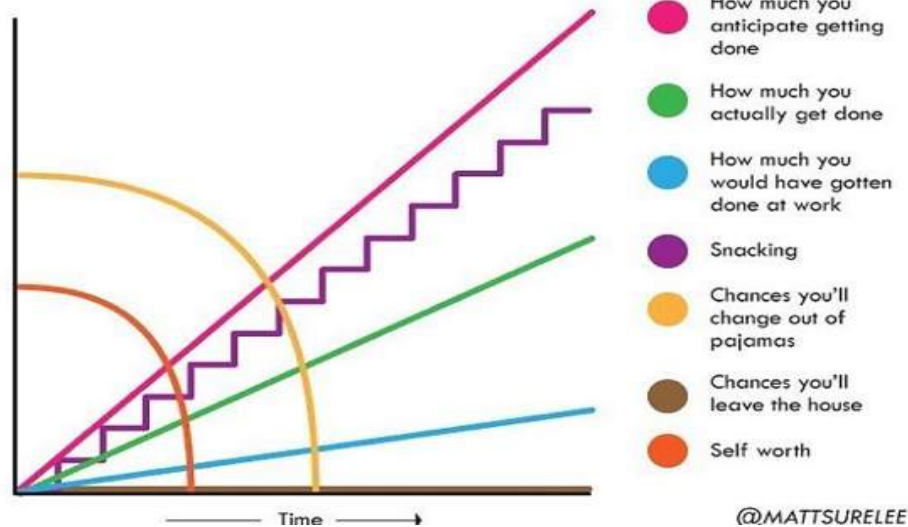
Exercise: Presenting data

Percentages

Share of each company in a market:

Company A   10%

Company B   40%

Company C   25%
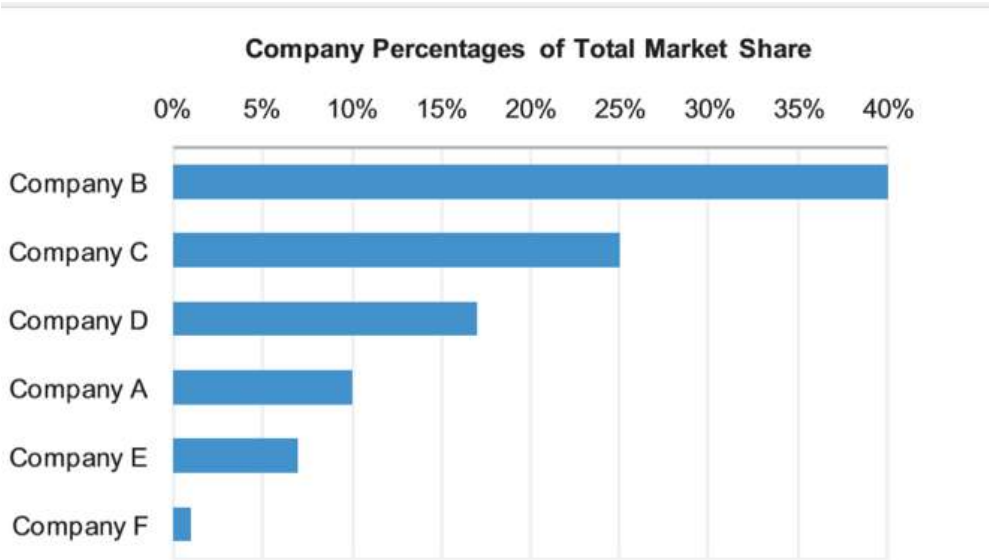
Company D   17%

Company E   7%

Company F   1%

What would be the best way of presenting it in a report?

- table?
- bar chart?
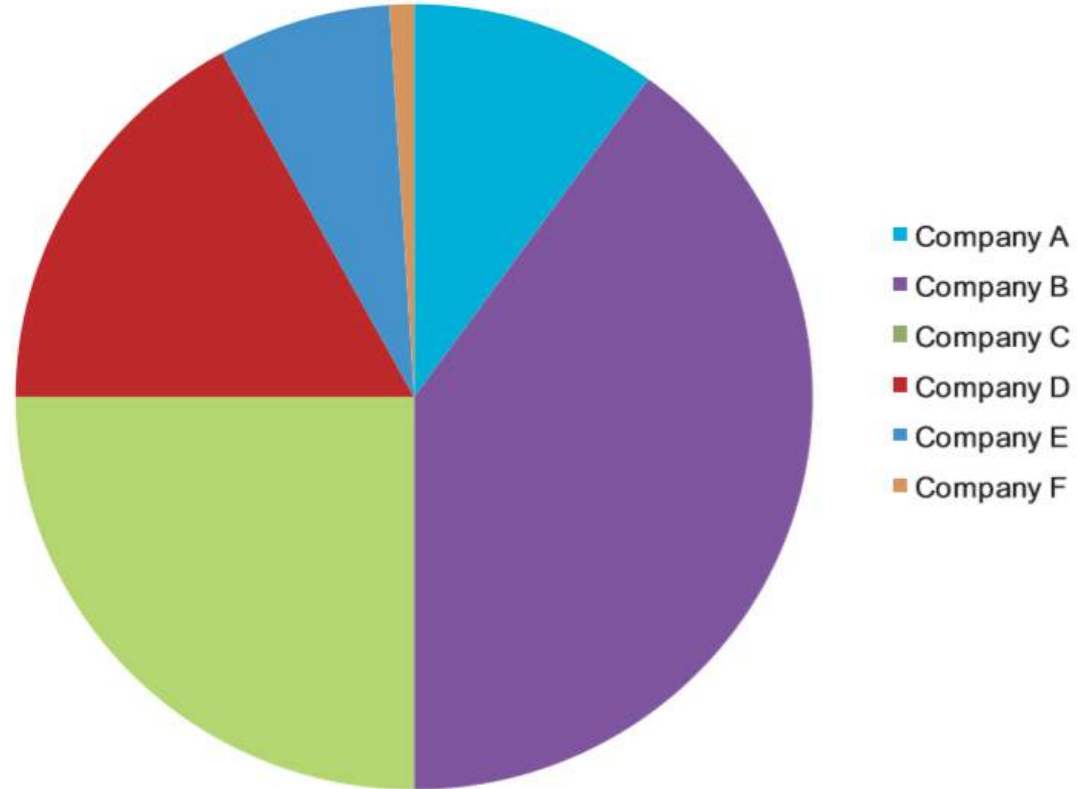- pie chart?
- line chart?

Table v bar chart

Companies	Percentage
Company B	40%
Company C	25%
Company D	17%
Company A	10%
Company E	7%
Company F	1%
Total	100%

Company Percentages of Total Market Share

| | 0% | 5% | 10% | 15% | 20% | 25% | 30% | 35% | 40% |

Company B
Company C
Company D
Company A
Company E
Company F

Table

Bar Chart

Pie Chart

Pie Chart

- Company B
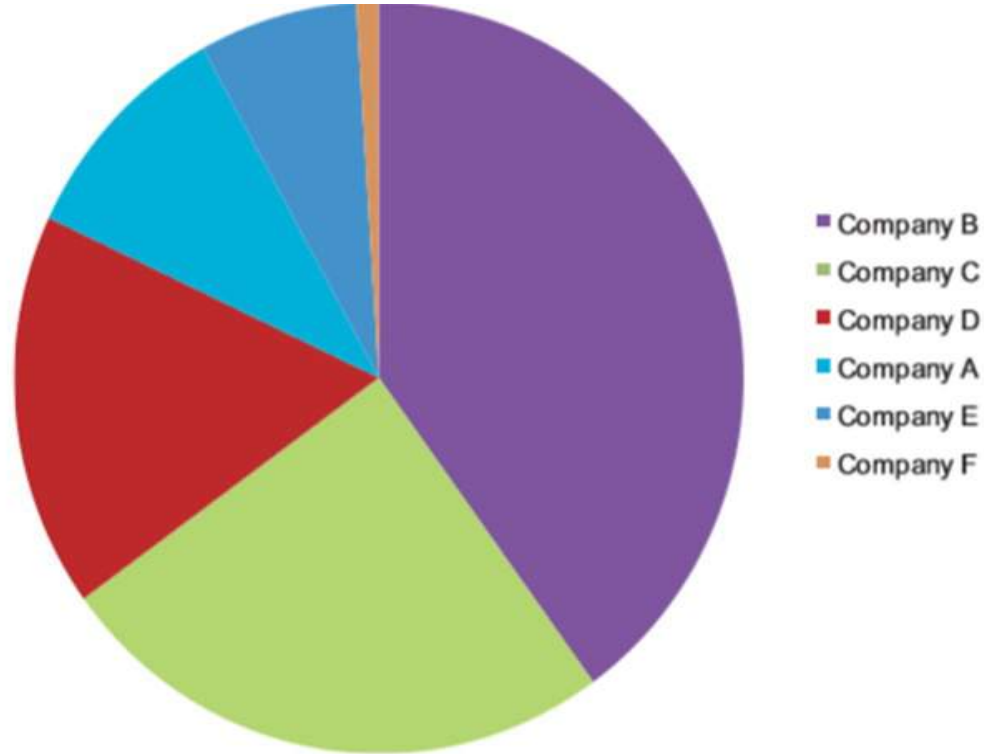- Company C
- Company D
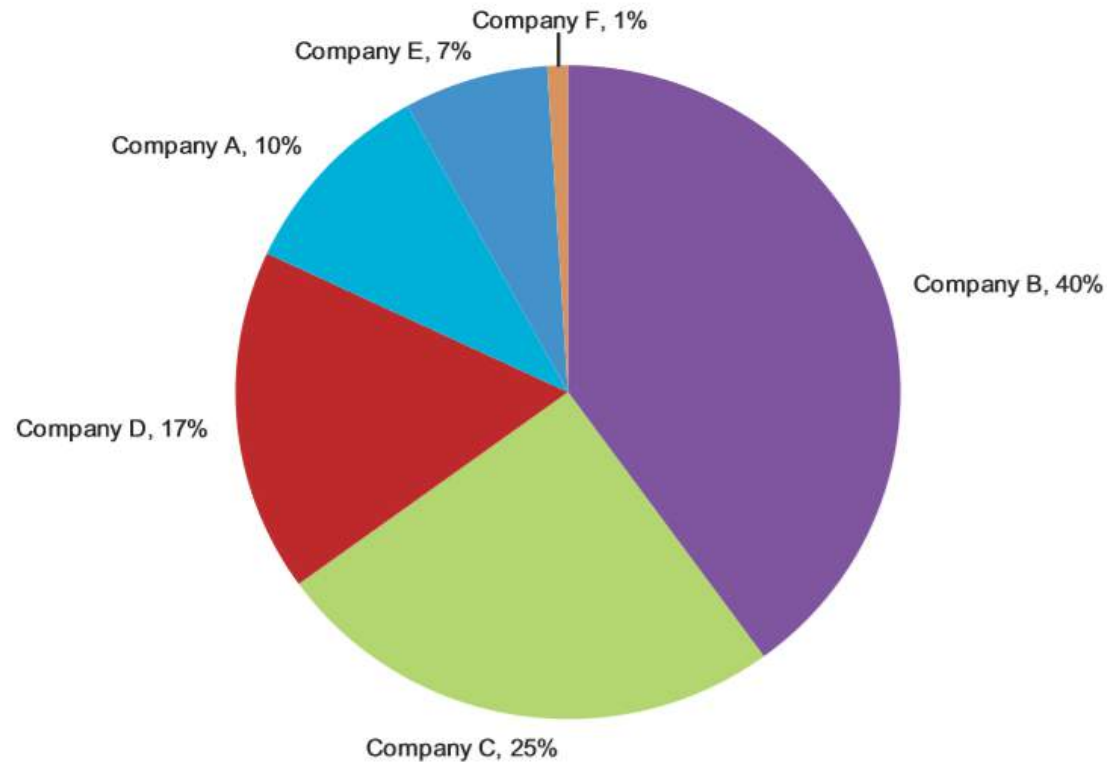- Company A
- Company E
- Company F

We Could Label it........

Tips on the use of charts

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Decide one point you want to make

Select right chart

Make chart title describe the point

De- clutter

Add comments to guide the reader

Thank you

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Mark Leyshon
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