THE FORMAL REPORT:
A COMPARISON OF INSTRUCTIONAL CONTEXTS

Jennifer J. Connor

Although instructors will always vary in their own individual approaches to courses, there appear to be two main contexts for formal report instruction, namely the elective course and the discipline-based instruction. This paper explores these contexts for teaching the formal report with particular reference to my own institution, the University of Western Ontario, where different approaches are used. After describing each context, I will assess their advantages and disadvantages with respect to successful instruction in the formal report.

Elective Course Instruction

Generally, in this approach a department mounts a course in functional writing or communication which is not restricted to students of a specific discipline; in other words, the course is open to anyone in the university community. It is often a semester course with no prerequisite in which the content is not usually geared to a specific student audience. More often than not, the elective is the only course in written communication which students take. The emphasis in the course may be on business communications or technical writing depending on the discipline of the home department and its instructors; therefore, instruction in the formal report and its components may vary depending on which focus is adopted. However, these courses typically follow a comprehensive approach, moving developmentally from business correspondence to informal reports, and culminating in a single formal report.

Many such individual elective courses exist at American universities [1], and we are beginning to see an increasing number of them in Canada [2]. A course following this elective approach at Western, for example, is Writing 102, "Advanced Exposition, Rhetoric, and Persuasion," recently offered as "Technical Writing." (A new course, Writing 105, "Technical Writing," will be offered beginning in fall 1986).

Discipline-based Instruction

This second context for teaching the formal report may be divided into two types: the faculty approach and the programme approach.

a)   Faculty Approach

In this approach, a faculty, school, or other major unit in a university mounts a course for its own students. There are variations of this approach: some faculties restrict the course completely to their own students; thus one university may have several faculties offering in-house communication courses [3]. Others might allow external students to take the course if there is room. The in-house course, however, is integrated with the faculty students' discipline-based studies, which at the same time provide a focus for the communication course.

Such is the approach taken by several faculties at universities in Canada, such as the Faculty of Engineering at the University of Manitoba [4] and at McMaster University [5], the Faculty of Agriculture and Forestry at the University of Alberta [6], and the Faculty of Forestry at the University of New Brunswick. The University of New Brunswick programme, as Jean Dohaney has pointed out, is cumulative and co-operative in nature; that is, students continue to prepare reports for the two years following their course in functional writing, and the reports are marked by content faculty as well as by the communications faculty [7]. In this way, students receive feedback and reinforcement throughout their programme.

A similar method is used at Western's School of Business Administration for the teaching of business communications. This school's communications programme is completely in-house and mandatory, offered only to undergraduate students in the second year of their business degree and to first-year MBA students. The programme requires students to submit duplicate copies of major reports for their business courses for a total of six to seven 1500-word reports (one of which is a group report) for the year. The duplicate copies are then marked by content graders and communications graders, the latter including the two full-time communications faculty and several part-time graders who have the reports delivered to their homes (usually 20-25 per week). Graders are chosen carefully for their communications ability. The recruiting instructors look for coaches, not judgmental critics; for this reason, not everyone who applies is accepted as a grader. The result is an interesting mix of backgrounds for the communications graders; fields represented include English, law, library science, business, secretarial science, journalism, and education. A few have been part-time graders for upwards of fifteen years, so there is some sense of continuity in the programme.

Though emphasizing preparation of the formal report in a very short space of time (the students receive a case to analyze on Thursday; the final typed report is due in duplicate by noon Saturday), and though well integrated in the students' own discipline and involving co-operation with content faculty, this approach still is not cumulative in the same sense as the University of New Brunswick programme. Another type of discipline approach--the programme approach--does provide the student with more cumulative learning.

b)   Programme Approach

Like the faculty approach, the programme approach allows greater
control over the communications subject matter, as well as greater
integration with the students' specific discipline. The ideal programme
approach, of course, would be an entire programme devoted to communica-
tions with emphasis on specific aspects, such as report writing, in
individual courses.   Few such programmes exist in Canada; the most
recent   include   the   six-semester   diploma   programme   in   technical
communication offered by Algonquin College in Ottawa and proposed degree
programmes to be offered in rhetoric and professional writing by the
University of Waterloo beginning 1986 [8].

A more discipline-oriented programme in Administrative Office
Management Studies (AOMS) is offered by the Department of Secretarial
and Administrative Studies at Western.   It consists of three core
full-year courses, as well as other required half courses. All courses
but the third-year course are also open to students from other areas of
the university.   In this three-year programme, the approach to teaching
the formal report is more cumulative; that is, students receive
reinforcement in report writing from their first to final years.

The first-year course, Administrative Studies 020 "Introduction to
Written Communications," covers most aspects of administrative communi-
cations from correspondence to reports. In the first term, students for
the past two years prepared an informal informational report on a
communications topic for which a situation and roles were provided. The
course instructors define "communications" in its widest sense to
include teleconferencing, electronic mail, computer security, micro-
computers, micrographics, reprographics, etc.   Previously, students
prepared group reports on the same topics. The course itself provides
instruction on report preparation, including library research, organiza-
tion, format, documentation, etc.; in the second term, a review of this
information is given for students to prepare their second report, a
formal, analytical one on a topic of their own choice.   Our main
requirement has been a topic and situation for a report which conceiv-
ably might be prepared in an organizational setting; this has allowed
both freedom and flexibility in topic selection.   Students have been
able to draw on their own experience for these reports, thereby making
them more relevant. For example, students from rural communities have
used the large farm as an organizational setting for reports on
livestock or equipment acquisition; similarly, students having assisted
in other family businesses have been able to write about office
equipment and procedures applicable to a situation with which they are
familiar. The topics have been approved by instructors, however, in one
of two ways: the students prepare an outline with preliminary biblio-
graphy, providing roles for themselves and the instructor; or they
prepare an informal unsolicited proposal for the instructor.   The
students also learn manuscript format for the formal report by

practising lab exercises on the equipment provided. They are
responsible for submitting typed or word-processed reports following
appropriate format.

In the second-year course of the AOMS programme, students are
required to prepare a major group report in the second term on a topic
related specifically to office administration. Similarly, the third-
year course also requires a major report on an office management topic
such as employee development, records management, or automation in the
office. Still another required course in the programme--AS 130 "Word
Processing"--includes the formal report for the major assignment.

Other department courses are not required for AOMS students, but
many take them as options, along with students from other disciplines.
In one such course, AS 170 "Office Environment Planning," students are
required to submit a formal report following brief discussion of the
instructor's requirements and the role of the report in the decision-
making process. In another half course, AS 150 "Organizational
Communication Theory," the formal report is taught in more detail.
Students from other programmes outnumber our own in this course, so
detailed instruction is deemed appropriate in the context of the
course. Up to three lectures are given on the formal report and its
role in organizational decision-making. Students till now have been
required to prepare two reports--the first informational, the second
analytical. Both reports required primary and secondary research; for
this reason, some instruction is given on survey and interview
techniques. Owing to time constraints, all students prepared
informational reports based on the same assignment; last year the
assignment involved textbook readability and Gunning's Fog Index. The
second report was based on a study of the student's choice from a list
of possible organizational communication topics from listening to
communication barriers to nondiscriminatory communication in the
organization. This year this study became the focus of the
report-writing component of AS 150. Rather than write an informational
report, students now write a formal proposal to conduct their study on a
communications topic throughout the term.

Thus, students taking courses in the Department of Secretarial and
Administrative Studies receive complementary and reinforcing instruction
in report writing in several different courses. They are exposed to
different report-writing situations and means for evaluation, thereby
developing their skills and confidence in this form of organizational
communication. Although instructors use different evaluation criteria,
the emphasis is basically the same in the AOMS programme courses:
presentation and style are important as well as content (usually reports
are marked 40% style, 60% content). Moreover, in addition to essays,
graduates of the AOMS programme itself have prepared a minimum of five
formal reports in the required courses; and probably around ten is the
norm including the optional courses. By the time they graduate, AOMS
students have received sufficient reinforcement throughout their
programme for them to know well how to prepare a formal report.

Discussion

This presentation would not be complete without discussing the merits and drawbacks of each context within which the formal report is taught--the single elective course and the discipline approach. Some have been touched on already. The discipline approach, for example, affords greater control through tighter focus on the communications subject matter, as well as greater integration with the student's specific discipline. The elective course, on the other hand, can be effective as a means of introducing a diverse group of students to report preparation, but it lacks the reinforcement a more cumulative approach can provide. Briefly, then, here are some advantages and disadvantages to each approach.

Because it is not restricted to specific students, the elective course provides more opportunity for those students who wish to take such a course voluntarily. However, since the course is not intended for a specific audience, the overall strategy is often an eclectic one, trying to meet the needs of a diverse group of students. While the strategy may be adequate, it is not as effective as a discipline-based approach. The nearest the instructor of the course can come to this approach, perhaps, is to encourage students to submit reports about subjects in their own discipline.

The fact that it is a terminal course can also affect the instructor's approach to teaching the formal report, for there is less room for flexibility. The terminal course versus the cumulative method can mean a prescriptive approach versus a more developmental one. In other words, students taking the terminal course have few opportunities to make writing or editorial decisions, and the instructor may require that one format be followed for each assignment. "What is the best format for this circumstance? how do I package this information for this particular reader?" are questions students may ask only once in a terminal course; and often, unfortunately, the answers may involve writing for the instructor or writing formulaically.

Another problem arises from the fact that such a course is clearly designated as a service course at some institutions. At one Canadian university, for example, the English course in technical writing is not allowed for credit toward the B.A. degree; at another, the English course is for engineering students only. Such designations clearly set the technical writing course apart from other courses offered in English departments and imply that it is a second-rate writing course for science students. The impression is unfortunate, for it does disservice to three people: the science student; the instructor; and the arts student who may wish to study technical writing in preparation for a career in high-tech Canada. The service course, in other words, by its very nature tends to be perceived as somehow less important than main-stream discipline courses in the home department, even though it may sometimes bring in more money in terms of numbers of students.

Moreover, the proper domain for such a course sometimes becomes a political issue at many institutions, as evidenced by some of the literature on the topic. Strong feeling exists among some engineering faculty, for example, that communications courses should be taught by engineering faculty, and not by English faculty or departments [9].

These problems can be overcome in the discipline approach to the subject because instructors familiar with the discipline or sensitive to its needs teach report writing for that specific student audience. Obviously such instructors are rare, so the co-operative approach seems even more desirable. For example, discipline-based reports could be marked by both content and communications instructors [10]. Unfortunately, however, even this approach is not always practicable for financial or logistical reasons. Several other methods may therefore be tried, based on experience elsewhere. Discipline faculty can teach portions or sections of the course [11]; practising technical writers and specialists can give guest lectures/tutorials/workshops [12]; discipline students with strong writing skills can act as tutors [13]; or a writing centre can be established in the discipline department to help students through individual tutoring [14]. Each of these methods would enhance the instruction of the formal report through its integration with other aspects of the student's discipline-based studies.

While the discipline approach is favoured, the elective course, if well thought out, is always an acceptable alternative. Such a course could incorporate some of the methods mentioned above. Whenever possible, however, that single course would best be augmented by reports required in other courses to allow students to pursue further study or develop their skills in the area. A cumulative approach is by far the best approach for teaching the formal report: practice may not make perfect, but it will make professional reports. The result is a student better prepared to meet the challenges of report writing in a career, and more able to prepare reports which are well-researched as well as sound in presentation.

NOTES

1. See, for example, Karl M. Murphy, "The Basic Technical and Business Writing Course at Georgia Tech," in George H. Douglas, ed., The Teaching of Business Communication (Champaign, IL: American Business Communication Association, 1978), pp. 42-46; Thomas M. Sawyer, "Teaching Writing in a College of Engineering," in Douglas, pp. 130-40, especially p. 138.
    Textbooks and accompanying instructor's manuals attest to this as well; see, for example, the sample course syllabi in Deborah C. Andrews, Margaret D. Blickle and Marilyn B. Silver, Instructor's Manual for Technical Writing: Principles and Forms, 2nd ed. (New York: Macmillan, 1982), pp. 5-8; John M. Lannon, Instructor's Manual to Accompany Technical Writing, 2nd ed. (Boston: Little, Brown, 1982), pp. 11-14.

2. Following are a few courses which seem to fit in this elective category (as gleaned from recent Canadian university calendars):

University	Course Title	Department/School
Guelph	Technical and Scientific Writing	English
Toronto	Writing for Business	Erindale College
Waterloo	Report Writing	English

Other courses are offered to secretarial students at the following universities; it is not clear whether other students may take the courses:

Acadia	Business Communications	Secretarial Science
Mount Saint Vincent	Communications in Business	Office Administration
St. Francis Xavier	Communications II	Secretarial Arts

See also E. Rennie Charles, "The Teaching of Business Communication in Canada," in Herbert W. Hildebrandt, ed., International Business Communication: Theory, Practice, Teaching Throughout the World (Ann Arbor: University of Michigan, 1981), pp. 117-31, especially pp. 121-22.

3. As, for example, at Arizona State University; see Sidney W. Wilcox, "Communication Courses for Engineering Students," Engineering Education 70(April 1980):750. Courses are offered for students within American business schools as well; see Herbert W. Hildebrandt, "The Teaching of Business Communication in the U.S.," in Hildebrandt, pp. 105-116, especially pp. 109-110.

4. See Anne Parker, "'Two Hats, One Head': The Problem-solving Approach to Technical Writing," Technostyle 3(Summer 1981):7.

5. Donald R. Woods and Irwin A. Feuerstein, "On Teaching Technical Communication," Engineering Education 70(April 1980):747-49.

6. Fritz J. Logan, "If It's Feasible in Flin Flon, It'll Work in Ouagagougou: On the General Applicability of Specific Canadian Tech Writing/Editing Approaches," paper presented at the annual CATTW conference, University of Guelph, June 1984, p. 4.

7. M.T. (Jean) Dohaney, "A Cumulative and Co-operative Approach to Writing Development in a Forestry Faculty," Technostyle 3(Spring 1984):6-8.

8. Barry Barclay, "Implementing a Technical Writing Program--The Algonquin Experience," Technostyle 3(Winter 1984):16-18; and Robert N. Gosselink, "Proposed New Honours Degree in English: Rhetoric and Technical Writing Option," presented at the annual CATTW Conference, Université de Montréal, May 1985.

9. See, for example, J.C. Mathes, Dwight W. Stevenson and Peter Klaver, "Technical Writing: The Engineering Educator's Responsibility," Engineering Education 69(January 1979):331-34; Nicholas D. Sylvester, "Engineering Education Must Improve the Communication Skills of its Graduates," Engineering Education 70(April 1980):739-40; Woods and Feuerstein, pp. 745-49. See also Elizabeth Tebeaux, "Technical Writing is Not Enough," Engineering Education 70(April 1980):741-43; Charles H. Sides, "What Should We Do With Technical Writing?", Engineering Education 70(April 1980):743-44; Jean Dohaney, "Make That Technical Writing Please!", Technostyle 2(Winter 1983):1-3.

    Interestingly, a recent survey indicates engineers' belief that the most qualified writing faculty should teach writing to engineering students. Over three-quarters of responding engineering colleges in the U.S. indicated that their writing courses are taught by faculty from English or communication departments outside the college of engineering. See Helen M. Loeb, "Writing Courses in the Engineering College Curriculum," Journal of Technical Writing and Communication 15(1985):46.

10. The University of Texas at Austin uses this type of co-operative approach in that the course in communications is taught by discipline faculty who then have student reports marked by English teaching assistants. See M.E. Leesley and M.L. Williams, "Improving the Writing of Freshman Chemical Engineers," Engineering Education 69(January 1979):337-39.

11. See Woods and Feuerstein; Nancy Roundy, "Team-Teaching Technical Writing: Audience Analysis and the Lab Report," Engineering Education 72(February 1982):395-96.

12. See Susan Moger and Robert G. Wlezien, "Using Current Technological Issues in a Writing Course for Engineers," Engineering Education 73(January 1983):316-18; and Sawyer, pp. 138-39.

13. See Ken Kiyama and Ellen Nold, "Engineering Students Teach Each Other to Write," Engineering Education 69(January 1979):334-37.

14. See Jennie Skerl, "A Writing Center for Engineering Students," Engineering Education 70(April 1980):752-55.

* * * * * *

Jennifer J. Connor was a member of the communications group at the School of Business Administration, The University of Western Ontario, before joining the Department of Secretarial and Administrative Studies in 1983. She has also taught report writing at the University of Waterloo and for the Society of Management Accountants of Canada.