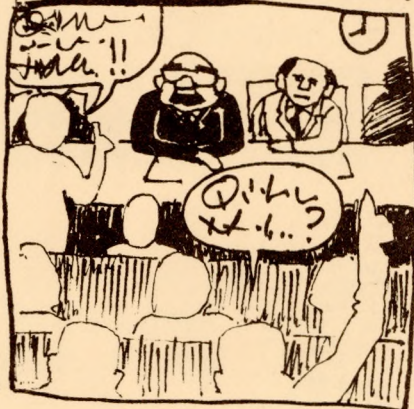
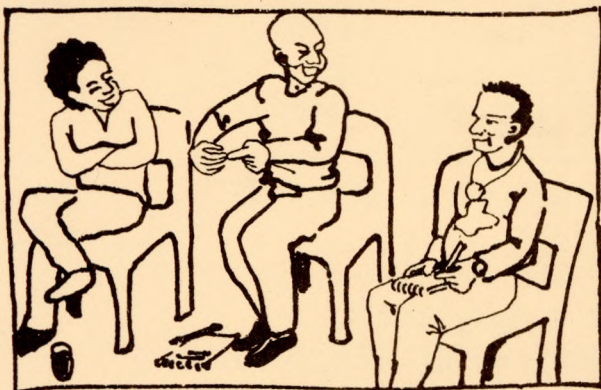
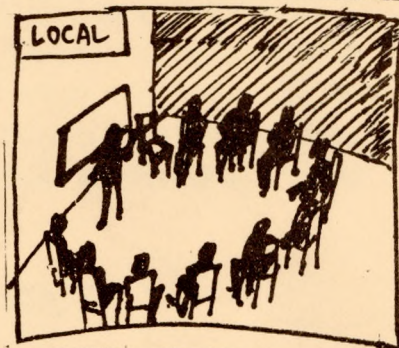
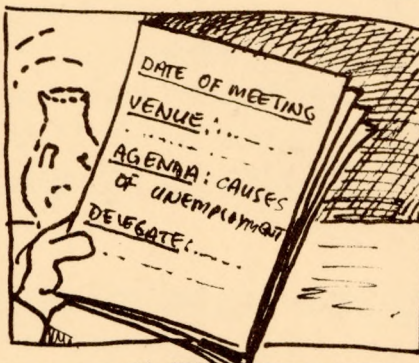
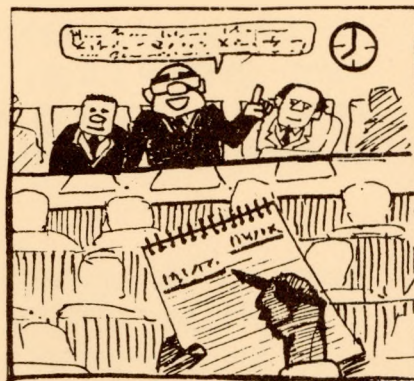
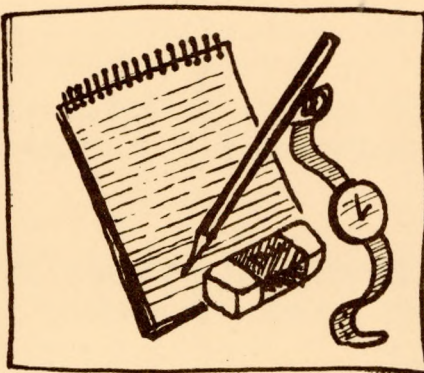
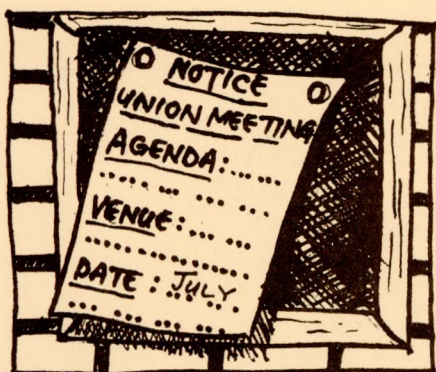


REPORT-WRITING MANUAL

THE CAPE TOWN
TRADE UNION
LIBRARY



A LACOM PUBLICATION

A project of the SACHED TRUST



ABOUT THIS MANUAL

For a number of years the Cape Town branch of the LACOM project has conducted workshops on report-writing, note-taking and minute-taking. Through this manual we hope to share our experience in these areas with a wider group of people.

We know that a number of manuals already exist on these topics, so why have we decided to write yet another one? This manual is different. It is especially helpful for **facilitators** who are organising and conducting report-writing and note-taking workshops. This is because this manual gives practical details on how to help people write reports and what methods to use in workshops. But this manual can also be used as a **reference** and **follow-up** for people who have attended these workshops.

How is this manual designed?

We have designed this manual in such a way that it is of practical value to facilitators working at grassroots level with shop stewards, community activists, community organisers and people active in community organisations, eg. youth, civic and co-operative structures.

Everytime you see this symbol it indicates that this is a note for the facilitator of the workshop.



We wish to emphasize that the skill and art of report-writing can only be acquired through constant practice. This manual can only facilitate and assist in this process by giving guidelines which will help people to practice report-writing and note-taking. Ultimately **people learn through doing**. This is also

why we have included activities and exercises - we know that people learn best when they are working actively with the material they are working from.

Everytime you see this symbol it indicates that this is an activity to do.



What are our educational principles?

We have tried to be as simple as possible in our presentation and design. We have based our manual on the following educational principles, and we believe your workshops should be based on similar principles:

- * The skill you teach must enable people to help themselves.
- * The skill must be needed by the participants. So we believe participants must be allowed the right to decide their own needs.
- * It is important to constantly draw on the experiences of participants.



"The role of the educator is to present to the people in a challenging form, the issues they themselves have raised in a confused form."

(Mao Tse Tung)

It is a good idea for facilitators to get participants to explore their expectations and aims for this workshop. So at the beginning of your workshops, ask participants:

- * What would they like to learn in this workshop
- * What are their needs in terms of report writing and note-taking?
- * What are their expectations?

Then modify your workshop programme to meet participants' needs and expectations.

How is this manual organised?

Together we will work through the following sections:

1. METHODS TO USE IN WORKSHOPS:

Notes for facilitators

- 1.1 Group discussionp. 5
 - Why do we use small groups?
 - Hints for small group discussion
- 1.2 Exercises.....p. 7
 - Why do we give exercises?
 - Hints for exercises
- 1.3 Writing.....p. 7
 - Why do we do written exercises?
 - Hints for written exercises
- 1.4 Role plays.....p. 9
 - Why do we use role play?
 - How to organise role plays
- 1.5 Some important ideas for workshops.....p. 10

2. HOW TO SUMMARISE INFORMATION FOR NOTE-TAKING

- 2.1 Why do we take notes?.....p. 11
- 2.2 How to select information.....p. 12
- 2.3 Learn to listen.....p. 15

3. HOW TO WRITE UP YOUR NOTES

- 3.1 Details.....p. 17
- 3.2 Draw up a plan.....p. 18
- 3.3 Organise your planp. 18
- 3.4 Write paragraphs.....p. 19
- 3.5 Headings and sub-headings.....p. 22
- 3.6 Numbering.....p. 23

4. HOW TO WRITE REPORTS

- Why are reports necessary?.....p. 25
- Who do we write reports for?.....p. 25
- How to plan a report.....p. 27

The different types of reports:

4.1 Routine reports.....	p. 29
4.2 Special reports.....	p. 30
4.3 Progress reports.....	p. 31
4.4 How to report objectively.....	p. 33

5. HOW TO PRESENT YOUR REPORT VERBALLY

How to prepare yourself for verbal reporting.....	p.36
How to structure a talk.....	p. 37
Tips to help you speak effectively.....	p. 37

Reporting is one of the ways we ensure that union officials and community organisers are governed by the principle of democracy. It ensures that union officials and community organisers always remain accountable to their members. We hope that you will find this booklet helpful in dealing with trade union work and community organising. Workers and community organisers can only grow stronger by increasing their knowledge.

** It is very clear to every "man" that the ignorance of the masses ensures that the masses will remain powerless. Knowledge is power. Well then fellow proletarians, in this matter there is no other help to be had other than self-help! What society has neglected you must fight to redress for yourselves till we take over as the masters of our own situation. The education of the workers must be accomplished by the workers' own organisations.*

(Alex Danielson, 1889 -Taken from The Workers Educational Association)

1.METHODS TO USE IN WORKSHOPS

: Notes for facilitators

Introduction

This section of the manual suggests some teaching methods to facilitators of workshops. Participants in workshops or training programmes are not empty vessels. Each one has something valuable to contribute to the learning process. So it is important for trainers and workshop facilitators to use different teaching methods to stimulate participants and to encourage their participation. It is no good using the old fashioned methods that are used in schools or classrooms. These methods do not challenge participants or draw on their experiences. There are other more democratic and empowering methods to use and we will discuss the following ones in this section:

1.1 Group discussion

1.2 Exercises

1.3 Writing

1.4 Role plays

We learn by doing. In fact, we learn more easily when we are doing something rather than when we are being told how to do it by someone else. So the idea of active participation by learners or participants should become an important part of how we plan education programmes for workers and community groups. Let's now look in more detail at some methods that are useful for workshops.

All the methods suggested in this manual can be done in groups. Group work helps people to work collectively, solve problems collectively and find solutions collectively. It develops healthy working relationships amongst members of the group.

1.1 Group discussion

Why do we use small groups?

Most people find it very difficult to speak in big meetings, groups or gatherings because they lack the confidence to do so.

EVERYONE TAKES PART

In small groups of three, four or five everyone can take part in the discussion. It is easier for shy or new people to speak. Domineering people can be controlled more easily. Individuals are made to feel their contributions are important and necessary.

BETTER ATMOSPHERE

Small groups are less formal. People feel more relaxed and are able to chat more freely. People can relate or interact in a more personal way.

SKILLS ARE DEVELOPED

People will act as co-ordinators (chairpersons) in small groups without too many problems, before they would chair a big meeting. Note-taking is easier as the group can assist with reporting. Duties can be shared and during workshops many participants get an opportunity to develop skills.

WORK IS DONE COLLECTIVELY

Small groups act as a collective more easily. People learn to listen to each other, share views and find common solutions. Also work or discussion happens at the pace determined by the group. Small groups are more flexible.

Hints for small group discussions

Workshop facilitators must give **clear** instructions about:

- * The questions to be discussed in the small group.
- * The tasks the group must do.
- * The purpose of the discussion (find solution to problem etc.).
- * The time the group has.
- * How notes have to be taken (eg. on newsprints, in note book).
- * How the group must select a chairperson.
- * How the group must select a reporter and note-taker, to report back to the larger group.

1.2 Exercises

Why do we give exercises?

Normally you give participants exercises to help them consolidate what was taught. Exercises are not given to test participants as if they were in school or writing an examination. Exercise are for participants and learners to enjoy and to find an exercise useful it has to be relevant and interesting.

It is useful to have exercises that relate to participants' daily lives or work, here are some examples:

- * For trade unions, you can use case studies of worker problems to solve.
- * You can set comprehensions about the history of their unions.
- * You can give an exercise on the labour movement.
- * For community workers, use case studies of community problems; or local history; or use local community newsletters and pamphlets to set comprehension exercises.

Hints for exercises

- * Answers must be simple. You are not trying to "catch" participants.
- * Language and instructions must be clear.
- * Participants can work in groups.
- * Exercises can be jointly discussed afterwards.
- * Answers can be used to stimulate critical thinking.
- * Participants should be allowed enough time for exercises.

1.3 WRITING

How do we do written exercises?

Writing does not come easily to everyone, and for people who work in factories and other workplaces it is even more difficult. Also, because of our educational system, working people often think that the skill of writing is best left to "well-educated" people.

Yet, writing plays an important role in all our organisations. We have to write:

- * letters
- * pamphlets
- * minutes
- * notices
- * reports

Writing is a skill and like all skills it has to be developed. For most people driving a motor car does not come naturally. We have to learn the skill. Well the same goes for writing, we have to acquire the skill.

Hints on written exercises

- * Tell participants to use their own language.
- * They should use simple language.
- * They should write short sentences.
- * Let them plan what they want to write.
- * Let them ask these questions to help them plan carefully,
 - What am I writing (typing)?
 - Why am I writing (pass on information)?
 - Who am I writing to (members, officers, others)?

REMEMBER : There is no single, correct way to write. But to help people read what is written, it is best to arrange your thoughts and ideas in a logical order. We will do an exercise on logical ordering in the manual.

1.4 Role Play

Role play has become an important method to use in workshops. This is because it helps people to think through or project many things they observe and experience in their daily lives.

Why we use role play?

- We use role play to improve skills and communication.
- To show different aspects of a problem.
- To explore "life-like" situations which reflect people's lives.



What do you think are the advantages and disadvantages of role plays? Spend 10 minutes discussing this and then add your ideas to the list below.

Advantages	Disadvantages
- Role plays are enjoyable. - Everyone can participate. - They are very flexible. - They make communication easy. - They stimulate debate. - They help develop skills in self expression. - People are required to listen and speak. - They build self confidence.	- Role plays are artificial situations. - People are afraid to express or expose themselves. - They reinforce stereotypes. - People can overpersonalise problems.

How to organise role play

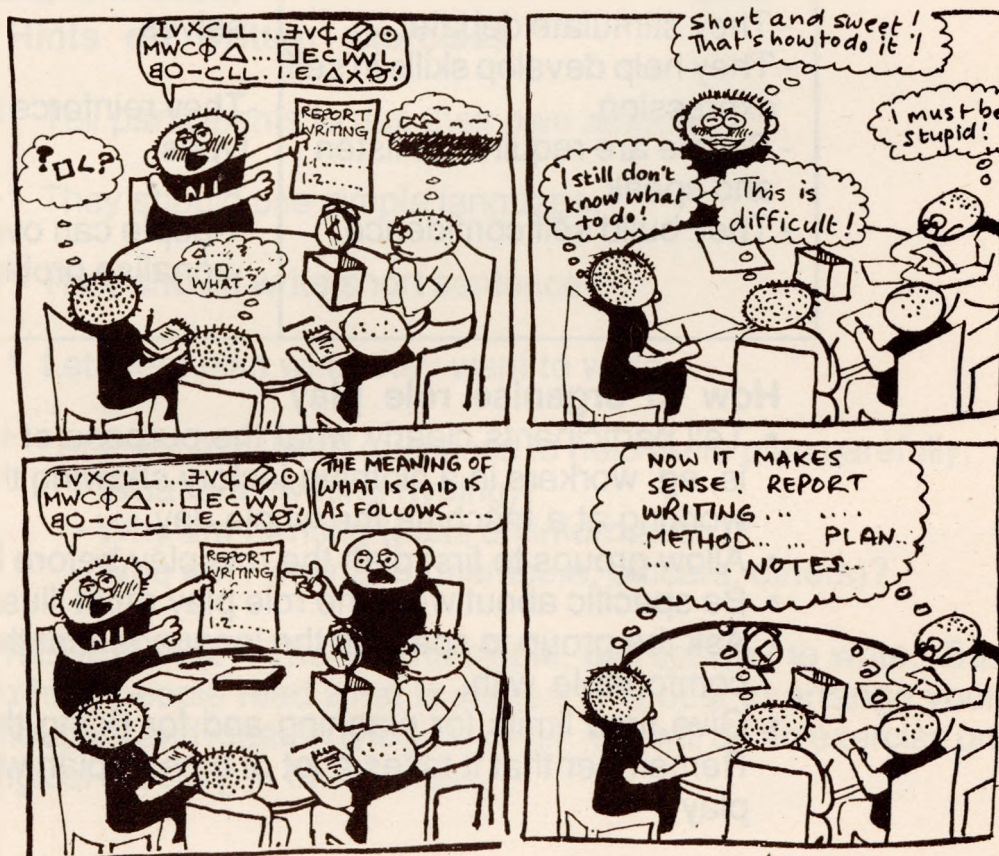
- * Tell participants clearly what the purpose of the role play is, eg. workers in a clothing factory showing the routine of working at a machine the whole day.
- * Allow groups to first plan the role play before they do it.
- * Be specific about what the role play must illustrate.
- * Ask the group to speak in the language that they are most comfortable with.
- * Give time limits for planning and for doing the role play. Remember that it takes a lot of time to plan well for a role play.

- * Be constructive about the discussion or criticism arising from the role play.

1.5 A word on language used in workshops

In a workshop situation where there are many people and they do not all speak the same language, it is best to allow participants to speak in the language that they are most comfortable with. Make this clear at the beginning of the workshop. This means that you will have to ensure that there is someone in the workshop who can translate for those who do not understand. This facilitates communication and understanding.

We know that workshop facilitators are not always keen to have to always translate because it extends the time of the workshop. But we firmly believe it is better to spend this time and make sure that everyone in the workshop understands what is being said. You will waste more time if you run the workshop and no-one has understood a word of what was said. So don't save time at the cost of understanding.



2. HOW TO SUMMARISE INFORMATION FOR NOTE-TAKING

Note-taking is an important skill which helps trade unionists or community organisers carry out their responsibilities effectively. Good note-taking is an essential part of communicating with others. Before we look at how to take notes, let's first discuss why we take notes.

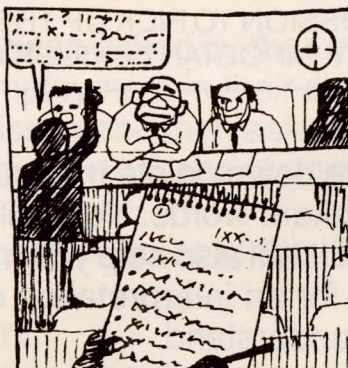
2.1 Why do we take notes?



- * Remain in the large group to discuss the advantages of note-taking.
- * Ask the group WHEN they think it is important to take notes, i.e. in which situations. Then discuss WHY it is important to take notes in these situations.
- * List participants comments on the blackboard or on newsprint. Add the ones below if participants have not mentioned them.

REASONS WHY WE TAKE NOTES

- We take notes to remind ourselves of things we have to do.
- Notes guide us in negotiations because we have all the facts in front of us.
- Notes can be used as proof of discussions, eg. involving management.
- Notes assist us in reporting to our members on meetings, workshops, etc.



When we take notes we do not write down all the information

from the meeting, workshop, etc. Rather, we **select** the information we consider to be important. So we have to decide what to include and what to leave out. In the end we are left with brief, but comprehensive notes.

How to select information

Often note-takers try to take down everything being said. This is not practical. Only the main points should be noted. In other words, we have to choose to write certain points, rather than others.

How do we decide which points to take note of? Sometimes the chairperson of a meeting will stop the discussion and summarise the main points for the note-taker. This makes our job a lot easier. But often the chairperson does not do this. Here are some useful hints which will help you decide what to take note of.

- * Decide what the **main point** of the discussion is. Ask your self:
 - What is the main aim of this discussion?
 - What information is important?
 - What are the **key words** of the discussion?

Key words are words which sum up the main points of a sentence or paragraph. For example, in a discussion about the causes of unemployment, the key words might be, no jobs; bad conditions; no qualifications.

YOU WILL NEED TO LISTEN VERY CAREFULLY TO THE DISCUSSION TO PICK UP THE KEY WORDS. SO LISTENING IS A VERY IMPORTANT SKILL TO DEVELOP.

- * Write down points **in your own words** rather than in the speakers words. You will be able to take down more this way. It will also help you make sense of your notes later on. Ask for an interpretation or translation of anything you do not understand.
- * Pay particular attention to **decisions** taken at meetings:

These must be properly recorded. A useful suggestion is to record the discussion and the decisions taken on separate pieces of paper. This allows you to check on decisions and to make sure that they have been carried out.

- * Ask the chairperson to **read out decisions again**, especially if you have to carry these decisions back to members. You need to know that you have taken down the correct facts.
- * You will not be able to make notes if you do not understand what is being discussed. The only way to overcome this is to **ask**, through the chairperson, **for clarification**. Do not be afraid to stop the meeting to ask questions. There might be others in the group who also do not understand what is being discussed. Your questions will help them, as well as ensure that you have an accurate set of notes.

When do you take detailed notes?

- * Take detailed notes when a discussion has taken place with management. In other words, when official decisions are made.
- * Take detailed notes of worker's or member's grievances, like accidents, working conditions, safety regulations, etc.

Activity on selecting information



We are going to do a role play to learn how to select important information. The group must imagine that they are a Shop Steward Committee. Ask for a volunteer to play the role of chairperson.

The Committee has been asked by the Union to draw up a list of the causes of unemployment in their area. The chairperson should introduce the issue and then ask all participants to contribute their ideas about the causes of unemployment.



Each participant must take notes of the discussion.

Note to facilitator:

- * Explain to the group what the purpose of the role play is, i.e. to look at a real situation where notes would need to

be taken.

- * Allow the group to first plan the role play, i.e. find a chairperson, decide how this person will introduce the issue, and how the rest of the group will participate. Give a time limit for the planning.
- * Explain that all the participants must take notes of the discussion, but they should be selective in what information they record. Suggest that participants use the hints on how to select information for note-taking.
- * Give a time limit for the role play.
- * After the role play discuss any problems people had with taking notes. Be constructive about the discussion or criticisms arising from the role play.

Here are a few reasons why note-taking could be difficult:

- * Often we are trying so hard to take everything down that we are not listening carefully to the discussion. We land up with a set of notes that we do not understand and that are useless.
- * Often we only listen to the discussion and forget to jot down the key words or summarise the main points. This often means that we forget what was discussed when later on we try to take down the notes.
- * Many people are too scared or embarrassed to stop the chairperson and ask for decisions to be repeated, or to ask for clarification on a point, or even for it to be translated. Remember you will not be able to take accurate notes if you do not understand the discussion.
- * Everyone will eventually develop their own method of note-taking. For some people, taking notes in a meeting helps them to concentrate on what is being said. For others, they prefer to listen first and take down their notes later. Whatever method you choose, it is important that you LISTEN to the discussion so that you understand and can take comprehensive notes.

Let's now look at the skill of listening.



2.1 Learn to listen

Listening is a skill that eventually becomes an art. It is a very important skill for a note-taker to develop. When we say listening, we do not just mean hearing what is said. We must hear and UNDERSTAND what is being said and sometimes also what is not being said.

We need to learn to listen and take notes at the same time. This is quite a difficult skill to learn and takes a lot of practice. We have to try to ensure that our listening does not interfere with our note-taking, and that our note-taking does not interfere with our listening.

Here is an exercise to do on listening.



Note to facilitator:

- * You are going to use Tape 1 in this exercise. This tape has recorded telephone messages on it.

- * The messages are brief, some lasting longer than others.
- * Play each message once and at the same time tell participants to try and take down notes of what is being said.
- * At first you may need to play the message a second or third time for the participants. But by the third or fourth message try not to repeat it.
- * After this exercise let participants read back the messages to the group. Some would have picked up points which others have missed.
- * Remind participants of the importance of listening, understanding and taking notes at the same time.

So far we have looked at how to select information for note-taking. Let's now look at how you write up your notes.

3. HOW TO WRITE UP YOUR NOTES

We have already said that notes should be brief, but they must also be comprehensive. There are many ways to make notes and you must decide on what method you like best. The most essential items to carry around for note-taking are a note book and a pen or a pencil and a rubber.

3.1 Details

Until now how have you taken notes? Do you record the date, time, names of people, etc. or do you think that this is unnecessary?

You should always record the following information at the top of the page:

- Notes on a **meeting** should include;
 - (1) Subject of the meeting.
 - (2) Place of the meeting.
 - (3) Date and time of the meeting.
 - (4) Names of the people involved.
- Notes from an **article or book** should include;
 - (1) Title.
 - (2) Author.
 - (3) Page number.

Why is it important to record the above information?

The above details seem very obvious but if they are omitted the notes will not be very helpful in the future. Also some of the members may not be familiar with these facts and need to be informed about them.

How many of you included these details in the notes you took from the role play? Include it now if you have not already done so.

3.2 Draw up a plan

Now you need to select the information you will put into your notes. Remember, you only want the main ideas, and not the details. So, begin by making a list of all the points you want to include in your notes. Let's look at an example of this.

The topic is : **Causes of unemployment.**

Our list could look something like this:

1. No jobs in the area.
2. No qualifications or experience.
3. Don't like conditions in jobs available.

We call this list a **plan** or an **outline**.



Draw up a plan

We are going to draw up a list of all the points we want to include under the topic, **The Housing Shortage**.

Note to facilitator:

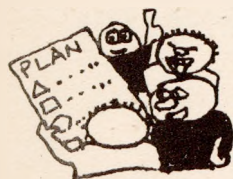
- * Ensure that participants have writing material - pen or pencil and paper.
- * Let people work in pairs or in small groups.
- * Give sufficient time for participants to draw up their own list. Remember that some people write very slowly.
- * Return to the larger group and ask participants to share what they have written. Write their responses on the black-board or on newsprint.
- * Keep the list for the next section on organising your plan.

3.3 Organise your plan

You have now written a plan for your notes. But you need to check that there is a development of ideas in your notes. So, now you must rearrange your points into a logical order.

Organise your plan

Let's take the list we drew up on **The Housing Shortage**.

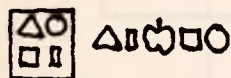


- * First group all similar ideas or information together.
- * Now decide, what is the most important information. Number this information with a (i).
- * Which point follows from the most important information? Number this with a (ii).
- * Carry on like this until you have rearranged your points into a logical order.

3.4 Write Paragraphs

We have drawn up a plan and reorganised the points into a logical order. Now we can begin writing short, brief paragraphs, using our plan.

A paragraph is a kind of list. It is a list of sentences. **EVERY SENTENCE IN THE PARAGRAPH MUST BELONG IN THAT PARAGRAPH.**



Which sentence does not belong?

In this exercise you must cross out the sentence which does not belong in the paragraph.



The Portuguese brought African slaves to Brazil in large numbers. Today, at least thirty-five per cent of Brazil's population is of African descent. Chile is also in South America. These descendants of slaves have preserved and adapted their African cultures in various ways. They have created an Afro-Brazilian culture which expresses itself through religion, art, music, dancing and folklore.

Have you found the sentence that does not fit?



Note to facilitator:

Either photocopy this exercise or write it up on a blackboard for the participants. Ask them to work out the exercise on their own first and then discuss it with them or let them discuss the answer in small groups.

Now let's take the list that was drawn up for **The Causes of Unemployment**. Now that we have a list like this, we can write a good paragraph on the subject. Here is a paragraph based on this outline.

CAUSES OF UNEMPLOYMENT

1. No jobs in the area.
2. No qualifications or experience.
3. Don't like conditions in jobs available.

Paragraph

There are many different causes of unemployment. Sometimes there are no jobs in the area where a person is living - or else all jobs are for qualified or experienced people, and the person looking for a job lacks qualifications or experience. He may refuse jobs which are available because he does not like the working conditions, or because the pay is bad. Then, once he has refused the job he finds that there is no other work available.

(The above exercise is from the Turret Senior English Workbook 3)

Write Paragraphs

In this activity we are going to help you write better paragraphs for your notes. This will also help you write paragraphs for your reports. Remember that the most important aspect of writing a paragraph is to have a main idea or topic. Once you have got your main idea, then you can build information around it.

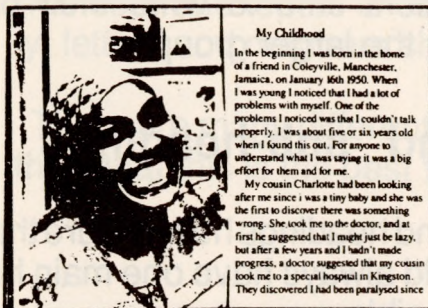
In this activity we are going to try to help you to write better paragraphs for your history. Remember that the most important aspect of writing a paragraph is to have a main idea or topic. Once you have got your main idea, then you can build your other information around it.

- 1 First read the paragraph below. Then try to answer the question which follows. The paragraph comes from a book called *Living and Winning* by Pauline Wiltshire, a disabled woman from Jamaica who now lives in London.

After the first weekend I was on my own. My family were at work or at school and I felt very lonely. There was no one to take me around or tell me of the new ways of living. My mother had advised me not to go out on my own so I didn't venture out to see the district I was living in. This went on for three weeks, with the exception of a few outings with my sister. I had seen very little of London. I had not lived with my mother since I was an infant. After a few weeks she seemed to lose interest in me. The family carried on with their very busy life of work, home and churchgoing. None of their activities seemed to be with me.

Choose from the list below what you think the main topic of the paragraph is:

- The work of Pauline's family
- Sightseeing in London
- Pauline's loneliness
- The area where Pauline lived



- 2 (a) You can usually find the main idea of a paragraph in a **topic sentence**. The topic sentence is often at the beginning or end of the paragraph. It may also be in the middle. Can you work out the topic sentence from Pauline's story?

- (b) Underline the sentence which sums up the topic of the paragraph below. The paragraph comes from an article called 'Bantu Education Begins' which appeared in *Upbeat* no 3, 1985.

From 1956 primary schools in the large towns were divided along ethnic lines. Xhosa, Zulu and Sotho and other language groups had been living together in the towns for many years. Suddenly African languages replaced English in the schools. Children were also taught in their own tribal traditions. In this way the government divided black people in a way they had never been divided before.

What about the other sentences in the paragraph? They all support the topic sentence. They give information about the main idea. The other sentences could include examples, details, supporting facts and explanations. What examples does the writer of the *Upbeat* article give to back up the main topic of the paragraph?

- 3 Here is an exercise to help you write a paragraph yourself. Use the information that we have provided for you. Remember to follow these steps:

- 1 Find a topic sentence.
- 2 Leave out unnecessary information.
- 3 Put in details that support your topic sentence.

- The fares had also increased in Pretoria.
- People in East London, Germiston and Randfontein boycotted in sympathy.
- In 1957 Putco decide to increase fares for people from Alexandra from 4d to 5d.
- Altogether 60 000 people boycotted the buses in 1957.
- There was no train service from Alexandra to town, so thousands of people walked to work every day.
- The people of Alexandra were the first to boycott buses in 1957.
- Alexandra is an old township.
- The Alexandra boycott was joined by people in Pretoria.

This activity is based on an exercise in a book called *Write Well* which is published by SACHED and Ravan Press. Look at this book if you feel that you need more assistance in paragraphing and other writing skills. It can help you a lot in writing history.



- (taken from *Write Your Own History*.)

Note to facilitator:

Photocopy these exercises for each participant. Either let participants do the exercises on their own or in small groups.

When you have finished with the exercises from **Write Your**



Own History, take the list we drew up on **The Housing Shortage**. Write your own paragraphs on this topic, using the list we drew up.

Note to facilitator:

Give participants sufficient time to write their paragraphs. Then go through them in the larger group.

3.5 Headings and sub-headings

Paragraphs, numbers and headings help ensure that notes are well spaced. Notes should always have one main heading and a few subheadings if possible.

Divide your information with clear **headings** and **sub-headings**. Headings are useful because they sum up the main ideas you want to present. Sub-headings divide your notes into main sections. Headings and sub-headings help give your information a logical structure.

How do you choose the most appropriate headings for your notes? The easiest way is by using the main ideas of the information you want to present. You can do this with each section i.e. use the main idea for each section as your subheading.

Choose brief headings. Sometimes questions are a useful way of making headings, eg. What are the causes of unemployment? or Why is there a housing shortage?

Write headings and sub-headings

- * Take the paragraphs you wrote on "The Housing Shortage". Write an interesting main heading for your notes. Remember the heading should inform readers about what is in the notes. It should also attract the reader's attention.
- * Now write sub-headings for each paragraph. The easiest way to do this is to use the main idea of the paragraph. Choose brief sub-headings.
- * Share your headings and sub-headings with the rest of the group.



3.6 Numbering

The use of numbers and letters is another way of helping people to follow your argument. Examine any document sent to your union or organisation. You will see firstly, that the use of numbers and letters is common in most documents. Secondly, letters and numbers show how items are related.

There are many different ways of numbering a document. We think that this is the best way:

NOTE THE SPACING
OF THE NUMBERS.

V.I. LENIN 9:10:88

A NUMBERING SYSTEM...

1. Introduction

1.1

1.2

2. Main body

2.1

2.2

2.2.1

3. Conclusion

3.1

3.1.1.

LACOM.

It is always best to use a system that you are familiar with.

Note to facilitator:

Provide the group with documents with different numbering systems. Participants should examine them in small groups and discuss the different methods. Then ask participants to number the paragraphs they wrote for **The Housing Shortage**.

SUMMARY OF HOW TO WRITE NOTES

In this section we said that one way of writing notes is as follows:

- * Record details at the top of the page, eg. subject of meeting, place of meeting, etc.



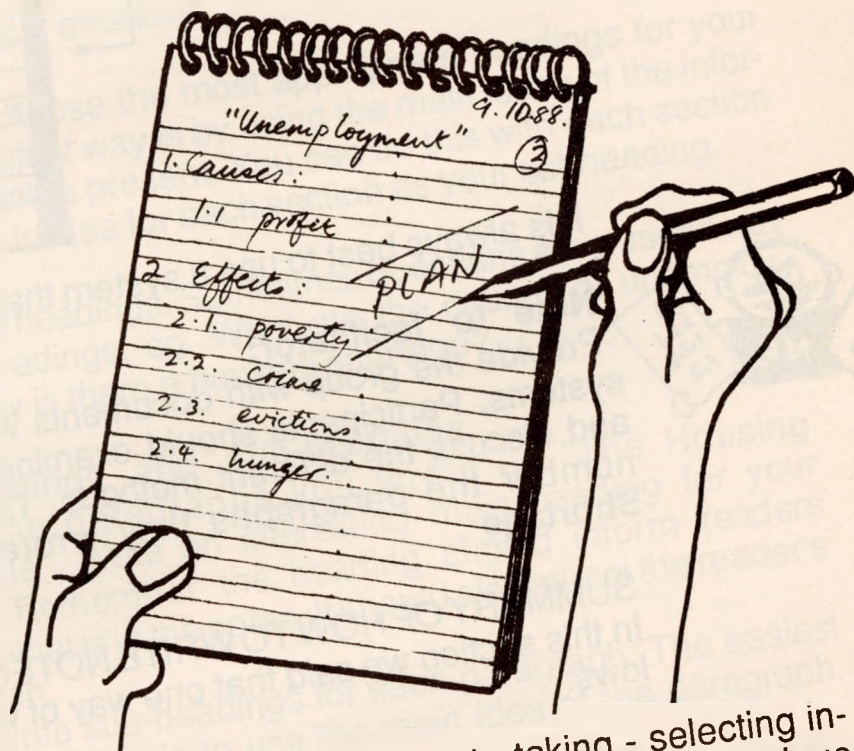
- Next, draw up a plan of the information you want to include in your notes.

- Reorganise your plan so that there is a development of ideas.

- Write short, brief paragraphs, using your plan.

- Write headings and sub-headings.

- Number your notes.



We have discussed and practiced note-taking - selecting information and then writing up your notes. Now let us continue and look at report-writing.

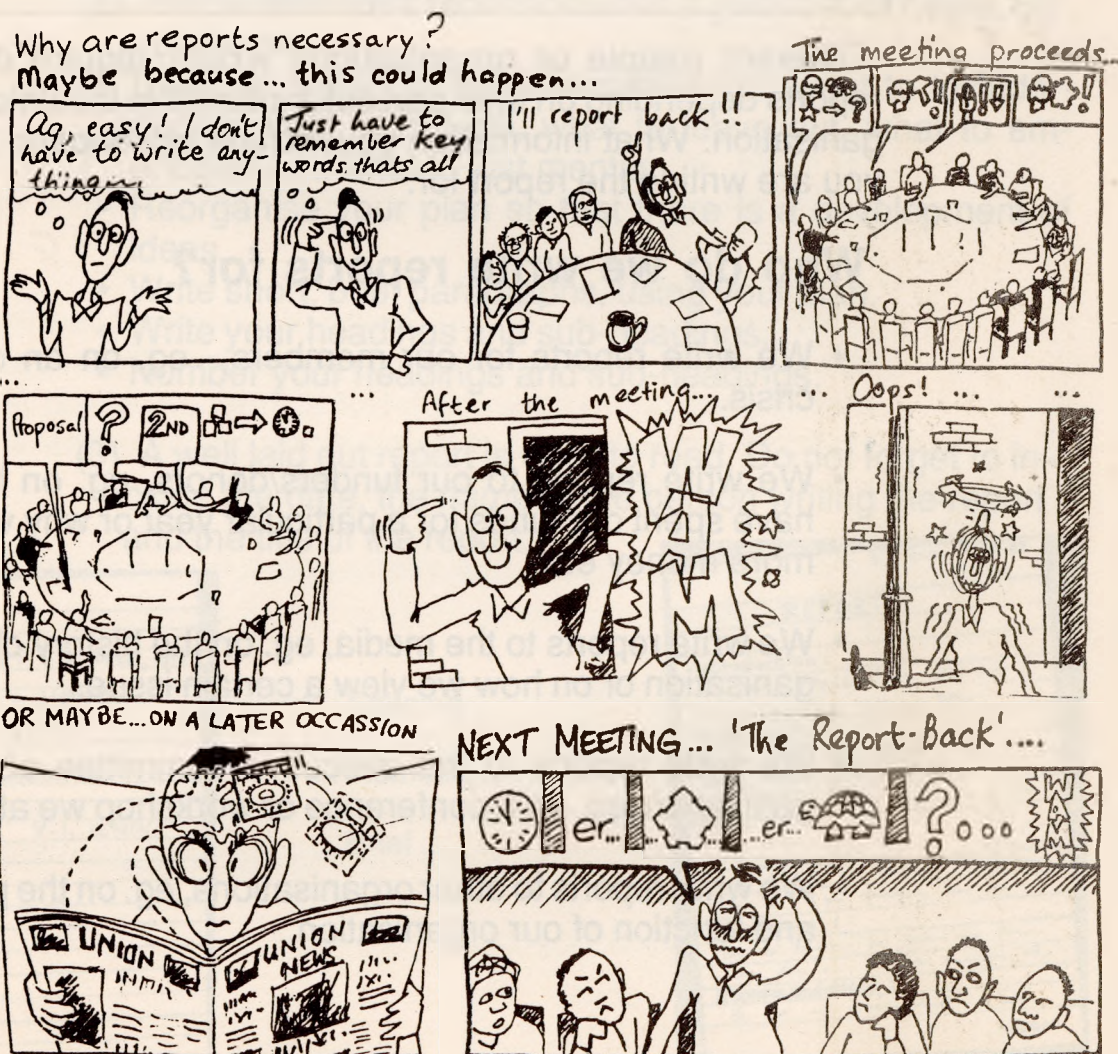
4. HOW TO WRITE REPORTS

Union officials and community organizers are accountable to their members. They must always inform their constituencies of decisions taken, of projects undertaken, of funds received, of problems facing the organisation, etc. The workers and community have a right to know. One way of ensuring accountability is by reporting to the workers or to the committee members or to the community. This allows members to participate in all the activities of the organisation.

Why are reports necessary?

Note to facilitator:

Remain in the large group to discuss why reports are important. List participants comments on the blackboard or on newsprint. Add the ones from the list below if participants have not mentioned them.



REASONS WHY REPORTS ARE NECESSARY

- * Reports help members to participate in the **democratic processes of organisations**.
- * Reports instill a sense of **accountability** into organisations.
- * They keep members **informed** of happenings in organisations and this in turn **educates** the members.
- * Members will then be in a position to help to **plan** the policies or strategies of the union/organisation.
- * They help members to make **informed** decisions.
- * Reports make it is easier to **assess** progress.

Different people or organisations would require different reports depending on their particular interest in the union or organisation. What information you include will depend on who you are writing the report for.

Who do we write reports for?

- * We write reports for our members, eg. on an ongoing crisis.
- * We write reports to our funders/donors, eg. on how we have spent our funds for a particular year or why we need more money etc.
- * We write reports to the media, eg. on the history of our organisation or on how we view a certain issue.
- * We write reports to the executive committee of our organisation, eg. on a conference or workshop we attended.
- * We write reports to other organisations, eg. on the purpose and function of our organisation.

These different people who read your reports will be interested in different aspects of your organization or union. There is no point in giving someone a report filled with facts they are not interested in. Like note-taking, report-writing is a skill that comes easy to some, but to others, it is a skill that has to be acquired by following a few guidelines and through lots of practice.

How to plan a report

- (1) The easiest way to draw up the report is to first ask yourself the following questions:
 - Who is it for?
 - Why are you writing the report?
 - What do you want to say in the report?

These questions will help you decide what information to include in your report and what to leave out.

- (2) Preparation for a report includes a good set of notes. So remember to:
 - * Draw up a plan of the information you want to include - decide what to include, what to leave out, what to emphasise and what to just mention.
 - * Reorganise your plan so that there is a development of ideas.
 - * Write short, brief paragraphs, using your plan.
 - * Write your headings and sub-headings.
 - * Number your headings and sub-headings.
- (3) A well laid out report is easy to read. Do not forget to include the date, the name of the person writing the report and the title of the report.

DATE OF MEETING : 9 OCTOBER, 1988	
VENUE	: MOWBRAY
AGENDA	:
"CAUSES OF UNEMPLOYMENT"	
DELEGATE	: V.I. LENIN.

... Spacing ...

... Tidiness ...

... Brief ...

V.I. LENIN - 9.10.88	
REPORTS	
Introduction:	
We will discuss the situation in the union.	
Our main concern is to improve the situation.	
Main body:	
At the last meeting we discussed the situation in the union.	
We have a lot of work to do in the future.	
We will be working on this in the future.	
Conclusions:	
We have discussed the situation in the union.	
We have a lot of work to do in the future.	
Recommendations:	
We will be working on this in the future.	
LACOM	

...And if reporting on a meeting or workshop that took place, include the venue (place of meeting).

- (4) Remember that reports should be interesting or else people will not read them. You can achieve this by excluding unnecessary facts or detail. Rather argue concisely and clearly. So your report should not be too long and you should not repeat yourself in the report.
- (5) Do not say things in vague or ambiguous ways. It is important that everyone understands the points being made. It is easier to organise members around an issue if they understand how an issue affects them personally.

Take into account the level of literacy of the people who will read your report. It must be in a language they understand.

- (6) Always read your document after writing it. Does it make sense to you?

A note on words

What do you do when you find a difficult word in a document you are reading?

Most people ignore the word and just carry on reading. Often this is not a problem and does not interfere with our general understanding of the document. But sometimes we do not understand an important point being made because the writer has used a word we are not familiar with.

How can we ensure that our readers do not have the same problem?

A good idea is to include a word list at the end of your document that very simply explains all the difficult words for the reader. But tell your readers that they can find this list at the end of your document. Or you can explain the difficult word as it is used - explain either at the bottom of the page or in the margin.

This is an example of a word list:

Democracy - all people have a say in the decision making.

Accountable - responsible to group with which you work or for whom you work.

Proletarian - working class as opposed to those who rule.

Your choice of words is very important. How often have you read a document that uses the word "he" when referring to people. This is not correct. It is better to refer to people by their role instead eg. branch organizer, group co-ordinator, shop steward, etc.

Give women the same respect as men or else you run the risk of alienating female members by using "sexist" language. Similarly avoid the use of "racist" words. Think about the words you use to describe people. Do you really need to mention workers' or communities' "race" or "ethnic grouping"? How relevant is it to your argument or document?

Now, let's look at the following types of reports:

4.1 Routine reports.

4.2 Special reports.

4.3 Progress reports.

THE DIFFERENT TYPES OF REPORTS

4.1 Routine Reports

These are reports that should be drawn up regularly by union officials and community organizers for members. These reports tell members what activities the union official or community organizer has been doing. Routine reports also tell members that their decisions have been carried out.

Routine Reports may be arranged as follows:

Date: (A date must appear on the report)

(1) Introduction

- * Record your name and place of employment or name of

organization.

- * Give a brief outline of what your report will cover.

(2) Body of the report

- * Deal with each point separately - give each a heading.
- * Present the points in the correct order.
- * Do not forget to include the appropriate facts under each point.
- * Stick to the subject matter (do not include unrelated issues).

(3) Conclusion

- * Summarize the main points raised.

4.2 Special Reports

Special reports are reports on a specific issue, eg. negotiations with management, meeting with local Authority Councils and meeting with other organisations.

Special reports have a similar structure to routine reports and may be arranged as follows:

Date: (A date must appear on the report).

(1) Introduction

- * State your name and place of employment or name of organisation.
- * Give a brief outline of what your report will cover.

(2) Body of report

- * Give an overview of the problem which has arisen.
- * The union or organisations' view of the issue.

- * The union or organisations' method of dealing with the problem.
- * Reasons for choosing this particular method.

(3) Conclusion

- * Summarize the main points raised.
- * Suggest appropriate action needed to be taken.

4.3 Progress Reports

Progress reports assess a project's progress.

Progress Reports may be arranged as follows:

Date: (A date must appear on the report).

Name of organisation/branch.

(1) Introduction

- * Name of project/activity unionist is engaged in.
- * Brief outline of what the project entailed.

(2) Body of report

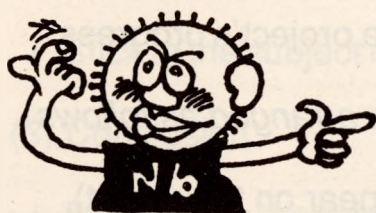
- * Aims of the project.
- * How did you go about achieving these aims? Did you for example have fund raising campaigns, workshops, conferences, etc?
- * What happened at these events?
- * Who did your project reach out to?
- * What were the results?

(3) Conclusion

- * Critically evaluate the project.
- * Discuss what was gained by the experience (this is besides the material or physical gain.)
- * Your Name.

To sum up:

All reports are laid out as follows:



V.I. LENIN. 9.10.88

REPORTS

Introduction:
We have had to do this, we are now in a better position.

Main body:
At the time when we were in the state of mind, we were not in a position to do this. We were not in a position to do this. We were not in a position to do this.

Conclusions:
We have now been able to do this. We have now been able to do this. We have now been able to do this.

Recommendations:
It is now recommended to do this.

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Write a report

- * You have been sent on a note-taking and report-writing workshop by your organisation. The workshop has included all the points we have covered so far.
- * Write a report on the workshop for your organisation, either for the Executive Committee or for your members.
- * Remember to answer these questions first:
 - * Who is this report for?
 - * Why am I writing this report?
 - * What do I want to say in the report?
- * Write a good set of notes to help you prepare your report.
- * Decide what type of report it is, i.e. is it a routine, progress or special report? Remember to use the appropriate structure for your report.



Note to facilitator:

This should become part of the workshop - the point to which people have been working. They must be able to summarise the workshop up until this point, say what they have learnt and write a brief report on this. So give plenty of time in the workshop for participants to do this exercise. After writing let participants talk about any problems they had with the report and discuss how these can be overcome. Participants will be given a chance to present their reports to the group later on.

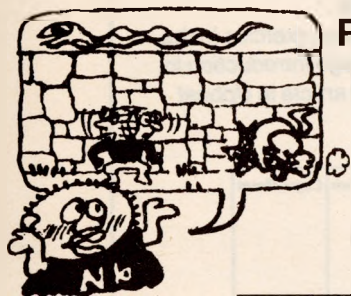
Before we look at how to present your report, there is one final area in report-writing that we need to discuss. This is how to report on facts as objectively as possible.

4.4 HOW TO REPORT OBJECTIVELY?

Often unionists and organisers have to attend meetings or conferences and then report back to members what happened. Their reports must be as accurate as possible. The representative must inform members of all the views put forward, even if they do not agree with the arguments or the decisions taken at the meeting. It is important not to mix up facts with personal opinion. If you are including your own opinions on a particular issue then the members must be told that this is your opinion.

Report Objectively

- * Ask participants to share any examples of their own where they have had to represent a point of view that they did not agree with. Discuss the difficulties with this and how they think these difficulties could be overcome.
- * Here are some exercises to do on bias.



Finding bias in newspaper reports...

Newspapers claim that they report only 'the facts' about an event. They say they don't express feelings or opinions about an event. In this activity we are going to look at two extracts from different newspapers and see if they give the same 'facts'.

First read these two passages and then try to fill in the chart which follows:-

2 die in clashes at Mamelodi — police report
Two people, a man and a woman, were shot dead as police clashed with mobs during a day of unrest in Pretoria's Mamelodi township yesterday.

A police report said that at 10 am a group of Blacks stoned a police vehicle. Police opened fire, fatally wounding a Black female. A Black male was also arrested.

In a later incident a group of Blacks threw a petrol bomb at a police vehicle. One round from a shotgun was fired, fatally wounding a Black man, the police report said.

Residents of Mamelodi staged a stayaway from work yesterday.

Township residents confirmed that most residents had not gone to work.

Earlier there were reports of people marching through the township in protest against the local council. The march was said to be in protest at high rents, the presence of police in the township, and the banning of weekend funerals.

The march was stopped by police. Most bus and taxi drivers servicing Mamelodi were warned by organisers of the stayaway not to operate yesterday, and groups of youths stood at terminals and railway stations to turn away workers.

6 die as police fire on crowd

Police and soldiers manned roadblocks around Mamelodi, near Pretoria, late last night after at least six people — including elderly women — died and hundreds of people were injured when police opened fire on a crowd of 50 000.

The crowd had been marching on the Development Board offices after a massive stayaway organised by local youths in protest against the army presence in the townships, high rents, stringent restrictions imposed on unrest funerals and the banning of weekend funerals.

The Mamelodi doctors, who together treated over 50 people, said most of the injured had been shot in the back with birdshot and buckshot and many had lacerations.

Dr Fabian Ribero, 52, said his consulting rooms were visited by over 30 people who 'looked like they had been in a war'.

Residents claim that they had asked the Mayor of Mamelodi, Mr Bennet Ndlazi, to lead the march to meet senior police officials to protest against the police presence in the area, the banning of funerals at weekends and high rents.

Witnesses said the crowd, consisting of old and young men and women and their children, gathered outside the board offices and waited for the mayor.

Armed police and soldiers arrived at the offices and told the crowd to gather at the local stadium if they had any grievances to voice.

The mayor tried to address the crowd from a police Casspir but was drowned out by chanting.

Police ordered the crowd to disperse within five minutes. They ignored the order and police opened fire. Witnesses said scores of people were injured as the crowd stampeded. Old men and women were trampled underfoot.

Youths then went on the rampage, stoning and gutting a number of delivery vehicles and setting up barricades with burning tyres, rocks and electric poles.

1 Copy the chart below. Use the two reports that you have just read to fill it in.

Now have a look at your answers that you filled in on the chart and compare them.

It is very clear that each reporter's views of 'the facts' is different. The reasons for this is that the reporters have a different point of view or bias.

2 What do your answers to questions (b), (c) and (d) tell you about the attitude of each reporter to the police and the crowd?

Everything that we read will have some kind of bias. So we must always try to be aware of the bias in what we read.

A person's point of view or bias can depend on their religion, gender, race or social class. The following questions can help you to identify bias.

- Who wrote the account?
- Was the writer male or female?
- Where does the writer live?
- When was the account written?
- Who was the account written for?
- Have any of these factors influenced what the writer has written?

Later when we look at interviews and photographs you will see that they give a certain interpretation of an event.

Suggested answers to this activity are at the back of the book on page 149.

This activity is based upon an exercise in the Turret Correspondence College *Introduction to South African History* and an article in *Upbeat* no 2, 1986.

	<i>Citizen</i>	<i>Cape Times</i>
(a) How many people died during the incidents of November 21 in Mamelodi?		
(b) Why did the police begin to shoot?		
(c) What words and phrases do the reporters use to describe the crowd and its actions?		
(d) Where do the newspapers get most of their information about the incident from?		

(Write Your Own History, pp 64-65)

- * Get participants to discuss what they have read. Ask them to present the facts to the rest of the group. Then discuss how objective each participant was in their presentation.

To sum up:

In this section on report writing we looked at the following:

- * Why reports are necessary.
- * Who we write reports for.
- * How to plan a report.
- * The different types of reports.
- * How to report objectively.

Now let's go on to our final section on how to present the report that you have written.



5. HOW TO PRESENT YOUR REPORT VERBALLY

A lot of people are nervous about reporting back verbally to a group. So what they do is stand up, read out the report quickly and sit down again without explaining anything. This is an incorrect way of verbal reporting. So, let's learn how you should report verbally.

How to prepare yourself for verbal reporting

(1) Use your set of notes as a list of points which will help you remember what you want to say. People do not listen to speakers who read out notes word-for-word.

(2) Always remember to write large notes that are well spaced out so that you can read them at a glance. You may use cards or small pieces of paper for each of your main ideas.

(3) Go through each point clearly and allow members to ask you questions. You do not have to answer all the questions. Someone else in the group who is familiar with the point can answer the question.

(4) Your sentences should be short and simple. But they should not be so short that they sound jerky. Long sentences are not so easy to write and are even more difficult to read well. The more ideas you have in one sentence, the more you confuse the listeners. So split your sentences into the separate ideas. Also remember that an interpreter would need short sentences to translate a report properly.

(5) Use language that you are familiar with. Do not try to sound impressive by using fancy language.

(6) Give examples as you go along, where possible.

(7) If you have to read a report word-for-word, then remember to:

- * Pause every now and then to and look at the members.
- * Explain in your own words some of the points you read out.
- * Vary the tone of your voice.

However, it is always best not to read a report word-for-word. Rather make photocopies of financial reports, etc. if possible and distribute them. Or better still, prepare a newsprint or write a report on a blackboard that everyone can easily see.

How to structure a talk

Introduce the report briefly. Discuss the main points and conclude with the relevant recommendations. With very important reports members can be asked to accept it point by point.

Some people feel very comfortable speaking in groups. Others have to learn to be effective speakers. Through practise and experience this is a skill that can be acquired. Ensure that you practice at home before a meeting if you are a person who finds it difficult to speak in groups. Get someone to check on how audible your voice is, the tone of your voice, how clear the points are, how well organised the report is, etc.

Do not worry if your first attempt is not very good. You will get better as you practice and have more opportunities in reporting back. The better you get the more confident you will feel.

Tips to help you speak effectively

- (1) Talk clearly and loud enough for everyone to hear (not too loudly though).
- (2) Look at everyone when talking (not just one spot or person).
- (3) Vary the tone of your voice. Only boring speakers use the same flat tone throughout.
- (4) Sound interested in what you are saying.
- (5) Have confidence in yourself.



Note to facilitator:

How can you help people build their confidence? One way is to allow people to use the language they are most familiar with. Another way is to create an environment in the workshop of comradeship, where people feel free to express themselves and free to make mistakes. People should not feel inferior in any way, especially if they make mistakes - in fact you can use these opportunities to point out that we learn from our mistakes as well as from our successes. The more practice people have in making speeches and in talking in groups, the more confidence they will develop. So always encourage participants to speak out.

- (6) Do not be rude.
- (7) Use humour as you talk but only if this is appropriate.
- (8) Be as concise as possible (do not talk for too long on one issue - people lose interest).
- (9) Correct any distracting body movements you might have.
- (10) Try to be as natural as possible.

Present your report

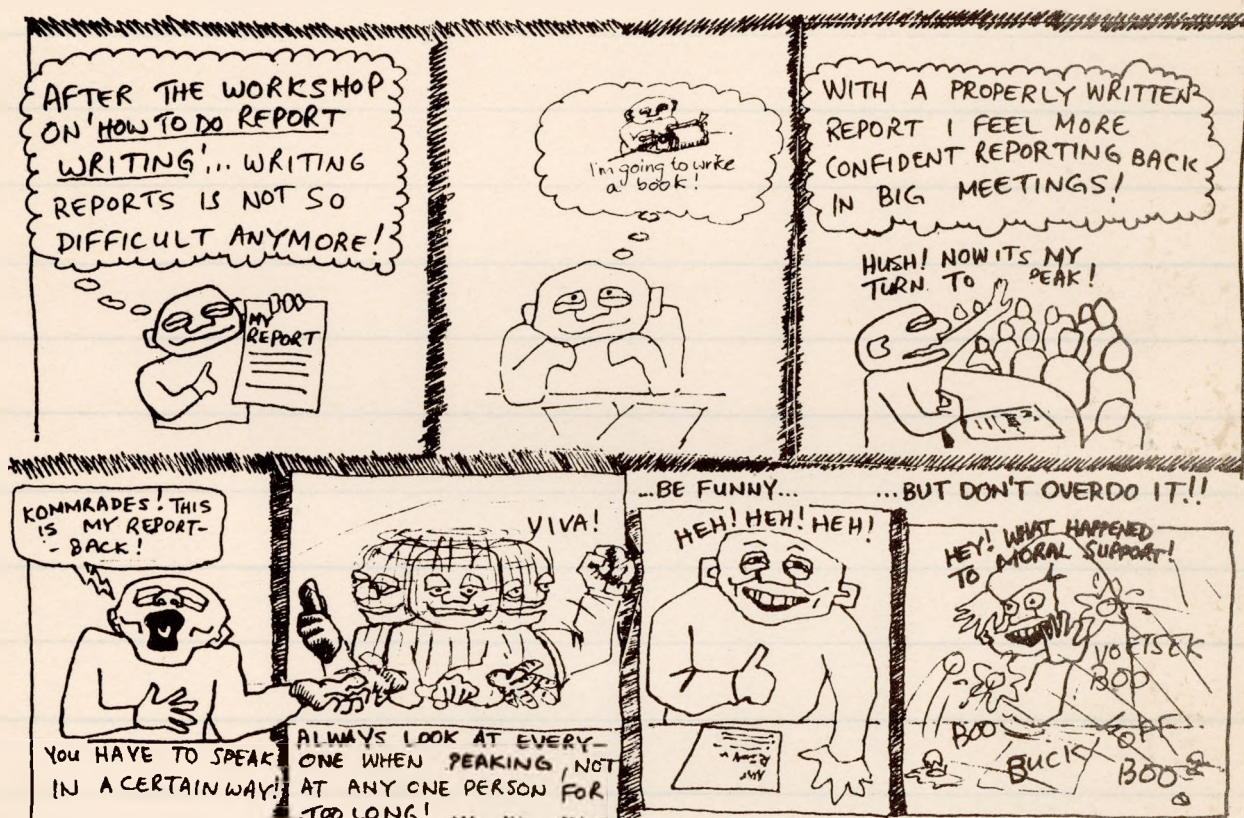


- * Take the report that you have written on the workshop on note-taking and report-writing. You are going to present a five minute talk to the group on what you have learnt in this workshop.
- * Make your set of notes to help you remember what you want to say. Remember to write large notes so that you can read them easily.
- * Structure your talk into an introduction, main points and conclusion.
- * Do not worry if you make a mistake in your speech - we are all here to learn.



Note to facilitator:

- * Give participants time to prepare and structure their talk.
- * Ask each participant to present their report verbally. Encourage participants to do this, do not force them.
- * After each presentation, discuss how the talker felt, how the listeners felt and how you felt. But be constructive in your discussion and criticism. Rather encourage and build confidence, than simply criticise. Remember that if participants think of themselves as 'poor speakers', they may be nervous or embarrassed to speak in a group. Try to make them feel at ease and **BUILD CONFIDENCE**.



We hope you have enjoyed working through this manual. The ability to write and present clear, simple and accurate reports and notes is part of the process of facilitating democracy and accountability. We hope this manual will contribute to that process. We welcome criticisms and suggestions on possible improvements to the content and presentation.

Notes

