



Guidelines for Report Writing

The following information is provided to assist with the development reports. Generally reports should:

- Not exceed 3 pages (there are exceptions),
- Be clear and succinct,
- Align with strategic objectives, and
- Be submitted in a timely fashion and by the predetermined deadline dates.

Introductory Information

- **Title:** This title should be reflective of the subject matter of the report. Remember the report may contain more than one purpose so be brief and succinct. As an example, Area Directors report for January 2017 and to request funding for a Zing.
- **From:** This should include your name and position title e.g. Area Director, Chair of Advocacy.
- **Date:** This should be the date you write the report and can also include the date of the meeting it will be discussed. For historical reference and tracking/disposition it is important to know when the report was received or discussed by the Board. As an example it is recommended that the date be listed as follows: December 23, 2016 for the Board meeting of January 7, 2017.

Purpose of the Report

A report can be for **information, discussion or action**. Report writers can pick any of these purposes however what is picked will determine the level of detail that is required for the report. It will also determine where and how a report may appear on the agenda. Below is a table that explains the different purposes and how the reports may be placed on the agenda and ultimately discussed.

Purpose	Agenda/ Action
<p>Information Report – This report provides an update or progress on activities. It may include data, statistics, statements or facts. Generally this report is used when things are going according to plan, there are no hiccups, questions or concerns. The report may fulfill a requirement of the Governor or International. E.g. providing information that the governor needs for International. There is no request for action or discussion.</p>	<p>These reports can be placed on the consent agenda. The agenda should list these reports by title or type. E.g. Area Director Reports, Committee name. The reports must be received for information by the Board. Generally the writer does not need to be present at the meeting for the report to proceed.</p> <p>On the consent agenda the following recommendation should be used: <i>That the following reports be received for information: (insert list.)</i></p> <p>If the report contains a recommendation/motion a decision will need to be determined if the item should appear on the consent agenda (see action reports below)</p>



Guidelines for Report Writing

Purpose	Agenda/ Action
<p>For Discussion Report – This report should be used when Board clarity is required, a change in direction may be warranted or there is general confusion on a course of action. A discussion report should not be used if there is recommendation on how to proceed. Action may come as a result of discussion but there should not be a preferred direction by the writer. This report should be used when you really don't know how to proceed and you need additional advice from the Board.</p>	<p>Generally discussion reports should appear on the regular agenda not the consent agenda. Recommendations can be developed as discussions proceed. The reports should be listed by author Committee and title. The writer should be available for discussion at the Board meeting.</p>
<p>For Action reports – This report contains a recommendation/motion (see below for information on developing a recommendation). The writer needs or wants approval of the Board to proceed with a course of action. The report should contain an analysis of information and risks on the recommended course of action. The request could be for funding, the use of resources, development of a new program, support to an existing program or a change to by-laws or policy. The recommendation should support a strategic action or direction</p> <p>Financial implications of the action should be discussed with the Treasurer in advance of the report going to the board. Consideration should also be given to consulting the Governor in advance of submitting the report.</p>	<p>Depending upon the recommendation, the item can appear on the consent agenda or the regular agenda. If the recommendation already meets budget requirements (e.g. included in the budget), is a follow up on previous discussions or is minor in nature the item could appear on the consent agenda. If the report does not have any budget approval or has not been discussed previously or there is doubt or controversy (dissenting opinions) about the recommendation it should proceed to the regular agenda. Always defer to the regular agenda if there is a concern. Reports that contain information and actions (recommendations) may need to be placed on the agenda separately (or twice).</p> <p>If an item appears on the consent agenda the recommendation from the report should be approved with the consent agenda information items. If the recommendation needs to be modified should be moved to the regular portion of the agenda.</p> <p>Recommendations on the regular agenda can be modified and allow for greater discussion.</p>



Guidelines for Report Writing

Developing a Recommendation or Motion

Recommendations/motions should be clear, leave little room for interpretation, and have the ability to stand on their own (when you read them you understand the action taken). In some instances recommendations may make reference to attachments in reports (e.g. a by-law changed). Recommendations should:

- Start with the word “That”.
- Indicate who is the decision maker e.g. “That the District 4 Board”
- Contain a verb/action required e.g. “That the District 4 Board approve”, “ That the District 4 Board recommend to Zonta International”, “That the District 4 Board support the proposal”
- Define the actual action.
- May contain a reference to the report

Here are some examples of recommendations:

That the District 4 Board support the proposed District By-law changes outlined in the report of the By-laws and Resolution Committee dated XXXX(insert date) and that they be forwarded to the membership for approval at conference in September.

That the District 4 Board receive the report of the Nominating Committee and put forward the following names for election: xxx (insert names)

That the District 4 Board approve a Zing for the Zonta Club of XXXXX in the amount of \$xxx.xx.

That the District 4 Board approve the expenditure of \$xxx.xx for the purchase of insurance for board members.

That the District 4 Board recommend to Zonta International that they develop policies related to xxxx.

That the District 4 Board establish an Ad hoc committee to review xxxxx.

That the District 4 Board received for information the Treasurer’s report dated xxxx that shows a balance of \$xxxx.xx.

That the District 4 Board approve the reallocation of funds in the amount of \$xxx.xx from the membership committee to the conference.

For further assistance consult the Governor, District Secretary or Parliamentarian.



Guidelines for Report Writing

OTHER SECTIONS of the REPORT

1) Facts (Information) Section

This section can contain activities since the last report, factual information to be brought to the Board regarding issues from Clubs or from Committees, other matters.

If the report is a follow-up to a previous report, refer to the date, title, and decisions of the previous report.

This section can contain background information and previous decision taken by the board. It may also provide information or examples of other organizations or Zonta districts or clubs.

Area Directors/Committee Chairs

Area Directors are required to report to the Board/Governor on various initiatives and actions established by the Governor, District and Zonta International. These initiatives are not necessarily required in other reports.

Committee Chairs should however make reference to the strategic plan and various initiatives when developing reports.

Initiative	Specific Actions	Highlights/Challenges
Comments		

2) Motion or Recommendations

This section includes the recommendations or motion (s) if any for the Board to discuss and vote on. Refer to the section above on how to develop a motion/recommendation.

3) Rationale

This section includes the basis, justification, or motivation of the motion/recommendation. This section should answer the reason why the board should proceed with the action.

4) Evaluation (Discussion)

As board member, and voice of Clubs and committees, express the pros and cons of the motion (s) presented. The section may present alternatives to the recommendation



Guidelines for Report Writing

Please be clear about:

- The challenge the proposal addresses
- Stakeholders who will benefit and how
- Added value to Zonta
- How the motion meets the requirements of the District or Zonta International strategic plan
- How the motion advances the objects or objectives of Zonta

5) Supporting Documentation

List any attachments to be considered as part of this report.