**Criterium Engineers**
**Report Writing Guidance**
January 2022

With the growing use of report writing systems like the Criterium Inspection Software Platform (CRISP), sample reports and reliance on templates, it's important not to lose sight of our fundamental objectives when writing a report. The following is a review of those fundamentals using the "VALUE" acronym which was introduced and discussed during our 2021 Criterium Conference. Incorporating the "VALUE" mentality into your reports, drawings and written communication will enhance your deliverables and also help you manage risk.

- **V**isualize your reader

- **A**rrange so it is easy to read

- **L**imitations in the report

- **U**nderstand scope and risks

- **E**ngineer review

# **V**ISUALIZE

Writing a report starts with visualizing the reader. The reader and client have experience, technical knowledge and expectations that are likely different from yours. As the writer of a report, you are in control. You are the only one that knows all of the relevant information, the scope and objectives, and the client's expectations. You also need to know and understand your audience and consider potential conversations between the client and you. When preparing a report, it can be helpful to visualize yourself getting questions about the report from a client, other potential readers of the report, and even an attorney. Sample reports, templates, standard paragraphs, graphics, tables, etc. are all just tools to assist you with your objective of writing a report that is easy to follow, clear and that your client can understand.

*"Clear thinking becomes clear writing: One can't exist without the other"*

*…..William Zinsser*

# **A**RRANGE

There are some proven, universal standards that increase your chances of effective, successful written communication.  They include:

- Purpose
- Brevity
- Use of common words
- Objectivity
- Clarity

Each of the above can be expanded to include more specifics about arranging and crafting good written communication.  Examples include:

- Short, concise sentences
- Logic that's easy to follow
- Headings that provide a roadmap to find topics easily
- Points clearly made and supported
- Sensitivity to the reader
- Elimination of redundancy
- Use of good sentence, phrase and paragraph structure
- Use of good grammar and commonly used words

Good reports are the result of clear thinking, clear objectives and good written communication.  Reports are enhanced by logical organization and presented with clear, relevant headings.

All of our report templates and samples are derived from following the approach below.  While outlines and templates are helpful tools for getting started on a report, don't get "stuck" in a particular template or report format just because it was used the last time for a completely different building.  A tool is only as good as its user!

The most basic format for an effective report is similar to a classroom curriculum:

1. Where are we going (Objectives)
2. Then go there (What can we learn?)
3. Where have we been (Conclusion)

To expand on this basic outline, here are the relevant, key elements of our standard report. Please remember that no list of detailed guidelines will substitute for having a clear purpose and delivering a report that achieves that purpose.

1. Where are we going (Objectives)
   a. Introduce ourselves (Introduction)
   b. Connect with our client; "As you requested…."
   c. State specific objective; what's included and what is not included
   d. Describe property (Description)
   e. When appropriate (especially for reports longer than a few pages), Executive Summary
   f. Let's explain our plan to achieve our objectives (select those appropriate)
      i. Methodology
      ii. Documents reviewed
      iii. People interviewed
      iv. Site conditions
      v. Photos taken
      vi. Appendices included
2. We're here (what can we learn?)
   a. What does your client think (Their concerns)
   b. What do we see during our site work (Our observations)
   c. What do we think about what we see (Our evaluation)
   d. What do we recommend based on our evaluation (Our recommendations)
   e. Other information as appropriate
      i. Cost estimates
      ii. Other observations
      iii. Suggested resources
3. Where have we been (Conclusion)
   a. Restate your objective
   b. Briefly summarize your achievement of your objective

## LIMITATIONS

As important as it is to be clear about the content of a report, it is equally important to define what the report is not. Language that calls out the limitations of a report helps clarify a report's scope and purpose while also serving as an effective risk manage practice.

Even if you have limitations in your agreement, contract, or made verbally with the client, many of these points are lost from memory when a report is delivered. Your report is what gets passed on to the client, so the final report is your last chance to document any limitations.

Some important limitations to include are:
1. What was and wasn't inspected at the property?
2. Reinforce that the inspection was visual and limited to what you could and could not see while on site
3. Is further investigation recommended?
4. Set the standards of the inspection; this is what we use normally - "Our inspection and report has been conducted consistent with that level of care and skill that is ordinarily exercised by members of the profession providing the same services under similar conditions at the time the services are performed."

# UNDERSTAND

Producing a strong report requires having a clear understanding of what needs conveyed in the report, including the client expectations, potential risks from the project, and adherence to the scope developed in the proposal.

To be clear, concise and direct in your report, it is important to understand the WHY of your chosen report, not just the HOW or WHAT.  To understand the WHY of your report, you must:
- Think about your client; his or her style or expertise
- Think about his or her project, and how your report relates to that
    o Just a piece of a bigger puzzle?
    o Headed toward litigation?
- Understand your client's expectations
- Think about the best tools to use in your report; focused, not excessive
    o Photos
    o Tables
    o Reference data
- If additional words, facts, and/or sections of the report are not relevant to the report's purpose or scope, remove it.  Every word in a report can and will be scrutinized if there is ever a claim or dispute about the project
- Think about what else will help you effectively achieve your objectives

If you understand the WHY of your report content and format, the HOW and WHAT will fall into place naturally.  What are some examples of WHY:

- Your client has a problem to solve
- Your client thinks something has been built improperly
- Your client has limited experience with buildings
- Your client has limited experience with engineering

Note that there is a common theme in the above, it's about YOUR CLIENT'S NEEDS. You cannot write a good report without constantly being guided by your client's needs. And your client (along with his or her project) is unique.

There may be several parties participating in any communication that is based on your report.
1. You, the writer
2. The reader to whom you have addressed the report
3. Other readers you may or may not know

The most important reader may NOT be the person to whom the report is addressed.

It is important to think about who the readers will be.


# Engineer review

Your final report is your <u>work product</u>. It captures and gives permanence to all the work you did on that project. Are you:

- Willing to put your engineer's stamp on it?
- Willing to defend it?
- Willing to be cross examined about the details?
- Comfortable that your client can rely on your findings?
- Proud of it?

To help ensure it is your best product, engage other professionals to review it.

Having another set of eyes reviewing your work helps support the quality, clarity and risk management best practices established in our organization and profession.

As a starting point for your report, **Attachment A** is a list of headings from which to choose. The first step in any good report is an outline. The headings provide that.

## TEMPLATES AND SAMPLE REPORTS

Where do templates fit in?
1. Templates are a tool to make report writing more efficient
2. Templates are a tool to assure that important risk management language is included
3. Templates are a reminder about topics to be included
    a. A quality control tool
4. Templates help with the HOW and WHAT
    a. But only after the WHY has been established
5. Templates <u>do NOT supersede or substitute</u> for the standards above

Where do sample reports fit in?
1. Sample reports are examples of how others have prepared reports for specific situations that may or may not be similar to yours
2. Sample reports are guides, not mandatory standards
3. Sample reports relate to situations that may be similar to yours, but not the same
4. Sample reports may or may not adhere to the standards outlined above
5. Sample reports do NOT supersede the standards above

Templates and Sample Reports are tools to provide consistency, quality control and efficiency in your work.  Without your skill and experience, even the best set of tools will not produce a good report.

**We use <u>two basic formats for our reports:</u>**

1. **Letter format** – for short reports (normally 2 – 3 pages or less), simple objectives and low to moderate fee. These are written like a letter, addressed to an individual, with minimal general information and a focused summary of the objective and results.
2. **Business format** – this is for all other reports and the basis of most of our templates and published formats.

**<u>To number or not to number?</u>**

Numbering the sections/headings in a report is optional. Generally, we recommend it since it makes finding things easier and allows for sub-paragraph organization. Using headings also facilitates automatic creation of a table of contents using WORD.

Below is an example of numbered sections:

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### 5.0 PROJECT PLAN

Our work will include the following steps. Bolded items are only performed if the Enhanced Reserve Study is selected:

5.1    A questionnaire will be circulated to all owners and/or tenants of the community to identify any special conditions of concern. The distribution of this questionnaire will be the responsibility of the Association with the responses provided to Criterium Engineers for review. **(ENHANCED)**

    5.1.1    Example of a sub-section
    5.1.2    Example

5.2    Discuss with the Association and review feedback from the questionnaire and the specific scope of the study. At this time, a specific list of components to be evaluated and to be made a part of the reserve study will be presented, reviewed, and finalized. **(ENHANCED)**

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## Headings

For all reports using the business format, the following is a list of headings to use.  They are designated **Standard** for those that are always used and **Optional** for those that are discretionary.  You may add others.  Your first step in writing a report should be to create a broad outline by choosing the headings you will use.

| HEADING | USE |
|---|---|
| **Title page** | **Standard** |
| - Project name | |
| - Client name | |
| - Company name | |
| - Date | |
| **Table of contents** | **Standard** |
| **Introduction** | **Standard** |
| - Includes objective | |
| **Description** | **Standard** |
| - Of property/site/etc. | |
| **Executive Summary** | **Optional** |
| - Use depends on length for report; include one if the report is longer than a few pages | |
| **Methodology** | **Standard** |
| - Who did the work | **Standard** |
|    o Resumes in appendix | |
| - Documents reviewed | **Optional** |
| - Site visit conditions/dates | **Standard** |
| - Standard of reference | **Optional** |
| - People interviewed | **Optional** |
| - Resources checked | **Optional** |
| **Standards & Limitations** | **Standard** |
| - Appropriate engineering standards | |
| - Limitations appropriate to project | |
|    o Visual inspection | |
|    o Not code compliance | |
| **Observations** | **Standard** |
| - Objective summary of information gathered | |
| **Evaluation** | **Standard** |

| | |
|---|---|
| - Your judgement about the significance of information gathered as it relates to the objective of the project | |
| **Recommendations** | **Standard** |
| - Your recommendations related to information found an objective of project | |
| **Cost Estimates** | **Optional** |
| - As appropriate to scope and objectives | |
| **Priorities** | **Optional** |
| - As appropriate to scope and objectives | |
| **Other Observations** | **Optional** |
| - Out of scope items and you consider important to note | |
| **Conclusion** | **Standard** |
| - Revisit objective, confirm fulfillment of the objective | |
| - Offer availability for questions | |
| - Thank your client | |
| **Appendices** | **Standard** |
| - Photos | |
| - Resumes and other reference material | |