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**MAKANA MUNICIPALITY**

**REPORT WRITING POLICY**



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| --- | --- |
| **FUNDING AND GRANTS POLICY** | |
| **Policy Number** | **O** |
| **Policy Name** | **Report Writing Policy** |
| **Policy Status** | **Draft** |
| **Version** | **No.1** |
| **Date of Approval** |  |
| **Date of First Implementation** |  |
| **Date Last Amended** | **New** |
| **Date of Next Review** |  |
| **Purpose** | **See Policy** |
| **Aims and Objectives** | **See Policy** |
| **Policy Custodian** | **Director Corporate and Shared Services** |
| **Related Policies and Legislation** | * **Local Government: Municipal Finance Management Act, Act 56 of 2003** * **Local Government: Municipal Systems Act, Act No. 32 of 2000;** |
| **Approving Authority** | **Council** |
| **Applicability** |  |
| **Policy Benchmark and References** |  |
| **Stakeholders Consulted** |  |

**MAKANA MUNICIPALITY**

**REPORT WRITING POLICY**

1. **OBJECTIVES:**

The purpose of this policy is to ensure uniformity, completeness and overall high standard of reports written by the employees of Makana Municipality.

1. **PERFECT REPORT:**

The purpose of a report submitted as an agenda item is to present information in a factual, objective and orderly manner to Council. It should also be written in such a manner that persons that have very little knowledge of the subject easily understand it.

The writing thereof should be in extremely direct and practical form excluded from feelings, emotive language and unusual words.

Correct expression in report writing involves accuracy in grammar, punctuation, word order and statement of information and tone. You should choose your reporting term carefully and include only relevant information. Always organise relevant factual information into logical sequence and present it concisely clear and in a suitable form. Sufficient and accurate information will have a definite impact on the quality of the decision taken.

1. **PRINCIPLES OF REPORT WRITING**
   1. OBJECTIVITY:

The report should not reveal about the writer. Writing in the third person should be used for example, instead of “From the investigation, I concluded that……” you should write , “From the investigation by the Senior Engineering Technician, it was concluded that…..”

* 1. CONCISENESS

A report must be concise. Conciseness does not necessarily mean writing a short report, it means being economical in your use of words, using as few words, using as few words as possible to express what has to be said. A lengthy report can be concisely written, but be careful never to make a report longer than it need be, because superfluous information is boring.

* 1. CLARITY

Facts must be expressed clearly and correctly and must be logically arranged in the exact chronological order of the event.

* 1. TONE OF STYLE

The most noticeable features of the style of report writing are:

* + 1. that it is generally written in a formal style.
    2. that it does not usually express emotion and
    3. that the passive voice is consistently used to maintain an impersonal tone.
  1. TENSE

The past tense is customarily used.

* 1. RESEARCH

Before writing a report first collects all the relevant information to be included in the report for example:

|  |  |
| --- | --- |
| ACTS | ORDINANCE |
| Auditor-General Act 12/1995  Civil Protection Act 67/1977  Constitution of the RSA Act 108/1996  Development Facilitation Act 67/1995  Electricity Act 41/1987  Foodstuffs, Cosmetics and Disinfectants Act 54/1972  Health Act 63//1977  Labour Relations Act 66/1995  Less Formal Township Establishment Act 113/1991  Local Government Training Act 41/1985  Local Government Transition Act 209/1993  National Building Regulations and Building Standards Act 103/1997  Occupational Health and Safety Act 85/1993  Rating of State Property Act 79/1984  Regional Services Councils Act 109/1985  Removal of Restrictions Act 84/1967    Road Traffic Act 29/1989  Subdivision of Agricultural Land Act 70/1970  Water Act 54/1956 | Cemetery Ordinance, 1932 (Ordinance No 8 of 1932)(Transvaal)  Division of Land Ordinances, 1986 (Ordinance No 20 of 1986) (Transvaal)  Local Authorities Capital Development Fund Ordinance, 1978 (Ordinance No 9 of 1987) (Transvaal)  Local Authorities Rating Ordinance, 1977 (Ordinance No 11 of 1977) (Transvaal)  Local Government (Administration and Elections) Ordinance , 1960 (Ordinance No 40 of 1960) (Transvaal)  Local Government Ordinance , 1939 (Ordinance No 17 of 1939) (Transvaal)  Municipal Elections Ordinance, 1970 (Ordinance No 16 of 1970) (Transvaal)  Pounds Ordinance, 1972 (Ordinance No 13 of 1972) (Transvaal)  Roads Ordinance, 1957 (Ordinance No 13 of 1957) (Transvaal)  Town planning and Township Ordinance, 1986 (Ordinance No 15 of 1986) (Transvaal) |

Remember to include research on all relevant files, previous reports, resolutions and new information on relevant topic etc.

Preparing a report requires a great deal of effort before the actual writing begins.

* 1. PLANNING

An outline is very important. Without an outline you may stray from the important facts or may fail to differentiate between important an unimportant facts. Planning the outline of a report has two main functions: It helps you to find an overall pattern for your thoughts and to analyse the structure and logical sequence of the report before it is written out in detail.

The outline should show the overall structure or pattern as well as key ideas. The purpose of drawing up a basic plan is that it permits you to establish that you actually do have a relevant plan and purpose in mind; if you don’t have, it will usually become evident in the lack of logical sequence and coherent structure.

Types of outlines that can be used:

I An outline may be merely notes or jottings to act as “memory joggers” throughout the actual writing of the report.

ii Each paragraph or section may be represented by a single-sentence statement containing the key idea.

This would help you to formulate each essential idea more completely as you are writing your draft.

iii) Sections of sub-sections may be listed as specific points or ideas, but these can have the effect of being restrictive in that you might tend to adhere too rigidly to your plan.

1. LAYOUT

Your reports should consist out of the following:

* 1. Item number e.g. Item C6.1 for Council or item number E6.1 for Mayoral Committee.
  2. Relevant Title, that is complete and fully describes the subject matter,
  3. File Reference Number for example 3/2/11

4.4 Reports should always be from the Head of the Directorate for example

**“Report dated 25 July 2013 from the Chief Financial Officer.”**

* 1. Content of report should include the following:

**4.5.1 PURPOSE**

[What the report intends to achieve]

**PLEASE NOTE: When first using acronyms – write it out in full, followed by the acronym in brackets (e.g. Municipal Finance Management Act (MFMA)), thereafter the acronym can be used in the rest of the report.]**

* + 1. **FOR DECISION BY**

**PLEASE QUOTE RELEVANT DELEGATION.SHOULD YOU REQUIRE GUIDANCE HEREIN PLEASE CONTACT THE RELEVANT LEGAL ADVISOR AT LEGAL SERVICES DEPARTMENT.**

[This section will indicate who the decision-making authority is i.e. the Executive Mayor or the Executive Mayor in consultation with the Mayoral Committee or Council and is to be cross-referenced to the recommendations e.g.

Paragraphs 1 to 3 or recommendation for Decision by Executive Mayor

Paragraph 4 or recommendation for Decision by Council]

**4.5.3 EXECUTIVE SUMMARY**

[While reports should be read in full by members where it affects their portfolio, they do not always have time to do the same for those reports dealing with other portfolios. A summary at the beginning of the report would enable them to quickly know whether they wished to read the whole report. The executive summary should capture the main points set out therein.]

* + 1. **RECOMMENDATIONS**

[It is the function of officials to evaluate all options and give a clear recommendation based on professional/technical considerations. Options should be included in reports where they genuinely exist together with an explanation of the pros and cons of each.

The recommendation should be numbered and set out exactly what you are seeking approval for – remember the body of the report is not being approved but what is being “recommended” under this heading. The working should correspond, as far as possible, with the wording of the Executive Mayor/Mayoral Committee/Council resolution desired and should be formulated in such a manner that the Committee Services use them, unaltered, in the minutes. Use (a), (b), (c) etc. to list each recommendation should there be more than one and lower case Roman numerals e.g. (i), (ii), (iii) etc. should there be subjective conditions to a recommendation. Should the recommendation contain both delegated and non-delegated recommendations, please group these together e.g.

“Delegated: for Decision by Executive Mayor:

1. Recommended that………………………………………………..

Not delegated: for Decision by Council:

1. Recommended that ………………..”

NB: Items requesting the VIREMENT OF FUNDS should include in the recommendation not only COST CENTRE AND VOTE NUMBERS, but also the PROJECT NAME from which funds are being taken.]

* + 1. **DISCUSSION/CONTENTS**

[This is the body of the report in which the background and purpose is expanded on. The following sub-headings should be used.

* + 1. **Constitutional and Policy Implications**

[Under this sub-heading, quote or summarise the existing policy/and or constitutional statement.

*If applicable, please confirm under this heading whether or not the proposal contained in the report complies with National and/or Provincial Policy. Please be brief.*

* + 1. **Environmental implications**

|  |  |  |
| --- | --- | --- |
| Does your report have any environmental implications: | No | Yes |

If yes, PLEASE NOTE that the automatic option of ticking the boxes below had to be removed. Please indicate with a cross (x) when selecting the relevant section. If no, delete the following sections.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Does your report result in any of the following: (indicate with a cross (x) where applicable) | | | | | |
| Loss of or negative impact on natural space and/or natural vegetation rivers, vleis or wetlands? |  | Loss of or negative impact on the Municipality’s heritage, cultural and scenic resources? | | |  |
| An increase in waste production, or concentration, pollution or water usage? |  | Development or any construction within any Flood Line of a river/stream? | | |  |
| Does your activity comply with the National Environment Management Act? | | | Yes | No | |
| Does your report complement and contribute to meeting the Municipality’s Integrated Environmental Policy and environmental targets? | | | Yes | No | |

Under this section indicate whether the contents of the report comply with the (Integrated Environmental Policy), as approved by Council in …………. This policy contains a number of key goals, targets and commitments for achieving sustainability in the Municipal Area. Principal among these is commitment to adopting and implementing the principles and underlying approaches to sustainable development and ensuring the integration of environmental issues into local government decision-making at all levels.

* + 1. **Financial Implications**

[The author of the report must, under this paragraph, spell out the financial implications including the financial impact on staffing if any. The attached Capital Financial Footnote **must** be completed.

NB: If you are seeking approval for the VIREMENT of funds, the REASON WHY these funds are AVAILABLE for virement must be given here.]

**Operating Budget Provisions:**

Cost Centre/Vote

Cost Centre/Vote

Description

Budget Provision

20011/20012

Please ensure that financial details have been verified by the relevant Finance Official.

Capital Budget Provisions:

Refer Capital Financial Footnote at end of report.

(Please ensure that financial details have been verified by the relevant Finance Official – signed below Capital Footnote on final report.)

* + 1. **Legal Implications**

[Should it be necessary to take steps to comply with any legal requirements as a consequence of the recommendations in the report please explain these under this heading.

Public participation is often legally prescriptive, should this be applicable to your report, details herein should be included under this heading. Please use clear and concise sentences.

**This section needs to indicate whether the recommendations comply with all council policies and with all legislation.**

* + 1. **Staff implications**

Does your report impact on staff resources or result in any additional staffing resources being required?

NO

YES

(If yes, please indicate whether or not it is part of the approved staffing structure, whether the posts are budgeted for etc.)

* + 1. **COMMENTS FROM THE EXECUTIVE MANAGEMENT;**
       1. INFRASTRUCTURE AND PLANNING SERVICES:
       2. SOCIAL SERVICES:
       3. STRATEGIC SERVICES:
       4. CORPORATE SERVICES:
       5. MUNICIPAL SERVICES:

(Unless the CFO has provided an input under the heading FINANCIAL IMPLICATIONS)

* + - 1. MUNICIPAL MANAGER

**ANNEXURES**

Annexures to the report to be listed here:

Please only attach annexures that are absolutely necessary. Endeavour not to attach copies of overhead slides, e-mails, pictures etc. –(1) instead of attaching an annexure try where possible to summarise the relevant portion in your report and make mention under this heading that the document is available from the author on request. In the event that the contents of the annexures are regarded as critical to the decision making, but too voluminous for inclusion, such annexures must be made available for scrutiny at the meeting.

1. **NOTE: In these instances the author must please ensure that all annexures, files etc. referred to in the report are made available at the meeting. Such documents must be handed to the relevant Committee Officers on the day prior to the meeting.**

**FOR FURTHER DETAILS CONTACT:**

|  |  |
| --- | --- |
| **NAME** | **[Compulsory to insert –** need not be that of the author but rather a contact person to whom reference can be made by Councillors, members of the public etc, requiring further information on the matters discussed in the report.] |
| **CONTACT NUMBERS** |  |
| **E-MAIL ADDRESS** |  |
| **DIRECTORATE** |  |

5 REVIEW/EVALUATE YOUR REPORT

After you have completed your report the following questions should be asked:

* Is the information clear and easy to understand?
* Is only relevant information presented in the report?
* Does the introduction and body of your report include all the necessary details?
* Are the facts accurate?
* Is your report written in a logical order?
* Do the Conclusions and Recommendations emerge logically from the findings?
* Have all comments been collected?
* Has the material been sub-divided appropriately into the different sub-sections?
* Is the numbering of sections, sub- sections and points correct?
* Is the style clear and smooth?
* Are the tenses correct and consistent?
* Will the report achieve the purpose for which it is intended?

6 GENERAL POINTS TO NOTE WHEN WRITING REPORTS

* Avoid abbreviations other than the very commonly used Pty, Ltd, a.m. and p.m. are permissible (Only those abbreviations accepted in a formal business letter are acceptable in a report).
* All dates must be written out in full: 10 January 1997
* Times may be written in the following example: 8:30 or 20:30.

Figures may be used, such as 60% but use your discretion. When in doubt, write out.

1. CO –ORDINATION OF REPORTS

7.1 Co- ordinating of reports and comments should be the responsibility of the relevant section Head of the different Directorates.

* 1. A programme should be handed out in respect of meetings, to give the report writer sufficient time for research and to write the report e.g.

|  |  |  |  |
| --- | --- | --- | --- |
| DATE OF MEETING | CLODING DATE OF REPORTS | FINALISING OF REPORTS | DELIVERY DATE |
| Actual date | 2 weeks before meeting (date) | 3 days and 1 week before meeting (date) | Delivery date |

7.3 Incomplete reports should be sent back to writers for completion before the closing date for submission of reports

7.4 Editing of reports should be done by the writer of the report; in respect of grammar, correctness of layout as covered in paragraph 4 and as far as possible; in compliance with relevant legislation.

Date adopted by Council: …………………………

Signed by:

Municipal Manager: ………………………………...

Director: Corporate Services: ……………………..

Department Head: ………………………………….