The course is designed to provide students with the skill and knowledge needed to compose effective business reports, including format of a report, informal and formal reports, minutes of meetings, agendas, itineraries, new releases, and advertising copy. Prerequisites include Business Grammar in Good Taste, Spell It Right, and Typing Business Reports, Outlines, and Manuscripts. Performance objectives and course content are outlined and classroom procedures, strategies, and learning activities are suggested. Evaluative instruments are discussed. A five-page bibliography lists resource materials including textbooks, drill books, practice sets, text-workbooks, reference manuals, audiovisual aids, and periodicals useful to both students and teachers. An appendix offers examples of footnotes and bibliographic styles. (MW)
AUTHORIZED COURSE OF INSTRUCTION FOR THE
QUINMESTER PROGRAM
DADE COUNTY PUBLIC SCHOOLS

EFFECTIVE BUSINESS REPORTS

Business Education--5128.31 (New: 7771.31)

DIVISION OF INSTRUCTION•1971
EFFECTIVE BUSINESS REPORTS
5128.31 (New: 7771.31)
Business Education

Written by Linda Cosentino
And Approved by the Business Education Steering Committee
For Quartermester Courses

for the
DIVISION OF INSTRUCTION
Dade County Public Schools
Miami, FL 33132
1973
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I. COURSE TITLE--EFFECTIVE BUSINESS REPORTS

II. COURSE NUMBER--5128.31 (New: 7771.31)

III. COURSE DESCRIPTION

A. Synopsis
   Designed to provide students with the skill and knowledge needed to compose effective business reports, including format of a report, informal and formal reports, minutes of meetings, agendas, itineraries, news releases, and advertising copy.

B. Textbook
   One or more of the state adopted textbooks in Business English and/or one of the department's choosing.

C. Occupational Relationships
   Correspondent
   Secretary
   Clerk-typist
   Receptionist
   Office Manager
   Stenographer
   General office worker
   Executive

IV. COURSE ENROLLMENT GUIDELINES

A. Prior Experiences Needed
   The student should have attained the objectives of Business Grammar in Good Taste, Spell It Right, and Typing Business Reports, Outlines, and Manuscripts prior to enrollment in this course. The language arts course, Report Writing (5113.46), provides valuable background experiences for this course.

B. Pretest
   This test should determine whether the student has attained the objectives of this course and of the preceding courses. It will help determine any individual deficiencies of the student and any advanced skills which will assist placement within the course.

V. COURSE OF STUDY PERFORMANCE OBJECTIVES

Upon successful completion of the course, the student will be able to--

1. write or type a 100-word original memorandum in correct form from given basic information using correct English grammar, spelling, punctuation, capitalization, and paragraphing;

2. discuss orally or write a paragraph about telegrams including available types, parts of each type, method of counting words, advantages of each type, and relative costs;
V. COURSE OF STUDY PERFORMANCE OBJECTIVES, Continued

3. compose in handwriting or on a typewriter a telegram in proper form from given information using as few words as possible;

4. write or type minutes of a meeting limited to the basic essentials from a given verbatim recording of the meeting;

5. compose in handwriting or on a typewriter an original brief news release using a lead, detail, and summary;

6. edit a typed rough-draft form for its accuracy and completeness with 95 percent accuracy;

7. write notes from three or more source documents selected by the student on 3- x 5-inch index cards (to be used in the completion of a term paper);

8. write or type an outline in correct form from the index card notes in Objective No. 7;

9. type or write a title page of a given report in correct form;

10. compose in handwriting or on a typewriter the body of a report in correct form from notes in Objective No. 7 with footnotes on at least two pages;

11. type or write a bibliography in correct form for the report in Objective No. 10;

12. type or write a table of contents of a given report in correct form;

13. assemble a complete term paper from Objectives No. 9 through 12 in proper order in a binder;

14. take a test on business forms and answer 85 percent of the questions accurately;

15. arrange given items of an agenda in proper order;

16. construct an itinerary from given dates, places, and modes of transportation; and

17. compose suitable advertising copy from given information.

VI. COURSE CONTENT

A. Equipment and Supplies
   1. Basic textbook
   2. Reference books and manuals
   3. Overhead projector
   4. Forms from companies as source documents
   5. Original report as an illustration
VI. COURSE CONTENT, Continued

B. Review
   1. Punctuation
   2. Spelling
   3. Grammar
   4. Word division
   5. Abbreviations
   6. Letter styles

C. Memorandums
   1. Heading
      a. To
      b. From
      c. Date
      d. Subject
   2. Message or body
   3. Reference Initials

D. Telegrams
   1. Types
      a. Full-rate
      b. Day letter
      c. Night letter
   2. Chargeable words
   3. Importance of conciseness

E. Minutes of Meetings
   1. Methods of recording
   2. Format
      a. Kind of meeting
      b. Name of organization
      c. Place and date of meeting
      d. People (officers) present
      e. Approval of previous minutes
      f. List of reports read and approved
      G. Motions made
      h. Resolutions adopted (written in full)
      i. Record of all ballots (number cast)
      j. Time of adjournment
   3. Reference manuals

F. Resolutions
   1. Correct form
   2. Proper sentence structure
   3. Reference manuals

G. News Releases
   1. Lead
   2. Details
   3. Summary
VI. COURSE CONTENT, Continued

H. Agendas
1. Form
2. Order of items
3. Reference manuals

I. Itineraries
1. Nature
2. For whom prepared

J. Advertising Copy

K. Manuscript (Formal Report)
1. Preparation of report
   a. Analysis of problem
   b. Potential sources of information
      (1) Evidence from reading
      (2) Direct observation
      (3) Questionnaires and interviews
      (4) Letters, samplings
   c. Note-taking on 3- x 5-inch cards
      (1) Guard against serious omissions
      (2) Permit rearrangement of data
      (3) Include full documentation (name, date, title, source)
   d. Outline
      (1) Number consistently
      (2) Express headlines consistently
      (3) Make subheadings specific
   e. Footnotes
      (1) Correct number
      (2) Correct style

2. Qualities of a report
   a. Accuracy
   b. Clearness
   c. Conciseness
   d. Restraint in language
   e. Convenience of reader

3. Final preparation
   a. Reference manuals
   b. Report binder
      (1) Attractive in appearance
      (2) Rugged construction
      (3) Complete in identification
   c. Title page
      (1) Subject title
      (2) Author's name
      (3) Person, company, department, or course for which report is written
      (4) Year and place submitted
   d. Table of contents
      (1) List every title, heading, and subheading appearing in the report
      (2) Indicate decreasing importance by increasing indentation of headings
VI. COURSE CONTENT, Continued

e. Body
   (1) Margins
   (2) Spacing
   (3) Footnotes or references

f. Bibliography
   (1) Correct spacing
   (2) Correct alphabetical order

VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES

A. Course Strategy and Method
Since this course requires much creativity and composition on the part of the student, it would be wise for the teacher to develop individualized learning activities. Audiotapes, learning packages, and assignment sheets could all be utilized to simulate actual office conditions where business report writing is an essential part of the job.

The teacher should stress the importance of frequent reference to up-to-date reference manuals especially for minutes of meetings, agendas, resolutions, and format for formal reports.

Classroom activities could include the following:
1. Demonstration of acceptable styles through the use of the overhead projector and original source documents
2. Composition in handwriting or on the typewriter of parts of forms for drill purposes
3. Checking and correcting reports and forms
4. Small group projects to find information on selected topics
5. Investigation of original source documents by students
6. Oral presentations made by students on selected materials
7. A written term paper using library research and personal investigation
8. Special activities such as crossword puzzles

B. Suggested Class Assignments
1. One of the presses of Florida Printers, Inc. broke down this morning. An important printing job will be seriously delayed unless a replacement part can be installed by Monday. Prepare a telegram to order the part. The part is described in the manufacturer's catalog as #45-6785 for Model X-Y, Morris Rotary Press. It is to be sent by air express. The manufacturer is Morris Printing Company, 5647 Atlantic Avenue, Boston, MA 021476.

2. Write a report on the courses in which you are enrolled. Include the names of the instructors and a brief description of the contents of each course.

3. As office manager for the Eastern Insurance Co., you have received comments from several employees and supervisors about abuse of coffee-break time. Company regulations
VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES

provide a 15-minute coffee break both in the morning and afternoon. Because you know that several employees take more than the time allowed, you decide to send a memorandum to all employees. You want to encourage them to abide by the regulations. You also want to make sure the violators understand that the company regulations provide a way of treating all employees fairly. It simply is not fair for some employees to take more time than they are allowed. Type this memorandum in proper form.

4. Visit your school library or public library to determine how the decimal system used in marking library books is related to outlining.

5. Outline an article from the editorial page of a newspaper.

6. Prepare a report to determine whether the school newspaper should include advertisements. Make the study by interviewing students for their opinions. Determine whether the amount of money that can be collected from advertising would help pay for the paper.

7. Select a news article from your local newspaper and rewrite the article in improved form. Attach the newspaper clipping to your revised form.

8. Assume you are to prepare a magazine article about your school. Prepare an outline for the article. Include some specific items you think will be of interest to the readers.

9. Write a brief memorandum announcing a meeting of one of the FBLA clubs in the school.

10. Write a report on providing a suitable parking area or increasing the present parking area for student cars.

11. Write a report on increasing greater all-around participation in school sports.

12. Attend a club or committee meeting in your school. Write the minutes of that meeting.

13. Assume you have been asked to report on your school placement office. Investigate the program of your school and find out as much detail as possible. Embody the results in a report.

14. You have been asked to find as many resources as possible on pollution. Use the school library, investigate personal sources, etc., and make a bibliography of these findings.

15. Write or type a term paper on a subject of your selection. Be sure to include a title page, table of contents, body of the report with footnotes, and a bibliography. Submit your outline of the report for approval before you begin to write the final report. Make notes on 3- x 5-inch index cards and submit these with your outline.

VIII. EVALUATIVE INSTRUMENTS

A. Tests

Formal objective or subjective tests should be used in this course, but on a limited basis.
VIII. EVALUATIVE INSTRUMENTS, Continued

Most evaluation should be based upon the individual creative progress of the student providing that the minimum objectives of the course are attained. Composition, style, and format of various types of business reports should be evaluated. Practical application problems that simulate actual office conditions will also provide valuable material for evaluative purposes.

B. Grading

Each teacher has a method of evaluation that has been successful. It is most important that the student clearly understands the criteria for grading and that the teacher is consistent in following the given criteria.

In a course such as this that requires much original composition, work should be evaluated by the teacher and returned to the student as soon as possible for revision and/or correction.

Tests that are objective in nature may be graded on a percentage basis with a minimum of 70 percent correct answers accepted for passing.

IX. RESOURCES FOR STUDENTS

A. Textbooks


IX. RESOURCES FOR STUDENTS, Continued


B. Drill Books, Practice Sets, and Text-Workbooks


*Success in Business Letter Writing*. Teaching Aids Incorporated. Available from P.O. Box 3527, Long Beach, CA 90803, price $1.00.


IX. RESOURCES FOR STUDENTS, Continued

C. Reference Manuals


D. Workbooks


E. Audio-Visual Aids


IX. RESOURCES FOR STUDENTS, Continued


Letter Writing for the Office. Twelve tapes, 42 lectures, (110800) for $131.40. Order from Class National Publishing Inc., 3025 Bunker Hill Road, Brentwood, MD 20722.

Punctuation. Each lesson contains one audio tape, a printed booklet, and a post test and key. Order from Multi-Media Office, Mt. San Jacinto College, 21400 Highway 79, Gilman Hot Springs, CA 92340. Following are the code numbers and individual titles:

BE 1-1 The Period
BE 1-2 The Comma
BE 1-3 The Question Mark
BE 1-4 The Semicolon
BE 1-5 The Colon
BE 1-7 The Dash


X. RESOURCES FOR TEACHERS

A. Books

Teachers' manuals, editions, and/or keys are available for most of the books listed in the previous section, Resources for Students, from the respective publishing companies.


B. Transparencies and Wall Charts

Overhead Transparencies are available from United Transparencies, Inc., P. O. Box 688, Binghamton, NY 13902. The following are most applicable to this course:

EU-S72 English Usage, 85 trans. in set
ETD-S72 Easy-to-Difficult Composition, 31 trans. in set

Overhead Transparencies are available from Western Publishing Educational Service, 1220 Mound Avenue, Racine, WI 53404. The following are appropriate for this course:
X. RESOURCES FOR TEACHERS, Continued

J 8-810  Telegram
J 8-812  Typing a Manuscript
J 8-813  Typing an Outline
J 8-814  The Title Page
J 8-815  Table of Contents
J 8-816  Typing a Manuscript Report
J 8-817  Bibliography

Two Manuscript Guide Charts, Set No. T-5. Teaching Aids, Inc.,
P. O. Box 3527, Long Beach, CA  90803.

Written Communications, 15-3709-1A. Transparencies, 20, color.
Enfield's, 3M Business Systems, 4000 N. W. 30 Avenue,
Miami, Florida.

C. Periodicals

Monthly, October through May.

Education Association. Monthly, October through May.

Business Education World. New York: Gregg Division of McGraw-
Hill Book Co. Five publishings each school year.

Journal of Business Education. East Stroudsburg, PA: Robert C.
Trethaway. Monthly, October through May.

Semi-annual.
EXAMPLES OF FOOTNOTES AS THE FIRST ACKNOWLEDGMENT

1. For a book by one author:


2. For a book by two or more authors:


3. For a book with no author's name:


4. For a book that is edited as a critical edition:


5. For an anthology:


6. For a book in a series:


7. For an encyclopedia article:


8. For a signed magazine article:


9. For an unsigned magazine article:


10. For an unsigned news story or editorial:

11. For a signed news story:


12. For a signed pamphlet:


13. For an unsigned pamphlet:


14. For a play:

   1William Shakespaw, Macbeth, IV. iii, 333-335.

15. For material from one source quoted in another:


16. For an interview:

   1Vincent Lembordi, interviewed by Pat Bartell (Green Bay City Stadium, Green Bay, WI) 10 am., Oct. 30, 1967.

17. For a personal letter:

EXAMPLES OF FOOTNOTES SHORTENED FROM SOURCES PREVIOUSLY ACKNOWLEDGED

1. For a work which has been cited in the immediately preceding footnote:
   11Ibid., p. 737.

2. For a book by one author when only one work by that author has been used:
   12Teele, p. 46.

3. When using more than one work by the same author, use a shortened form of the title that has already been referred to. For example, if you are using two books by the author Edward W. Teele, use this form:
   12Teele, op. cit., p. 47. or 12Teele, Golden, p. 46.

4. For a book by two or more authors:
   14Brocker and Weinstein, p. 64.

5. For a book with no author’s name, use a shortened form of the title:
   15Weester’s Biographical, p. 500.

6. For a book that is edited or a critical edition (if referring to the same selection from the book):

7. For an anthology (if referring to the same work in the collection):
   17King, p. 170.

8. For a book in a series:
   18Wrighting, p. 10.

9. For an encyclopedia (if referring to the same article):

10. For a signed magazine article:
    20Lovely, Travel, p. 36.

11. For an unsigned magazine article (if no references are made to other articles in that magazine):
    21Time, p. 89.
EXAMPLES OF FOOTNOTES SHORTENED FROM SOURCES PREVIOUSLY ACKNOWLEDGED, Continued

12. For an unsigned news story or editorial (if no references are made to other articles in that newspaper):

13. For a signed news story:

14. For a signed pamphlet:

15. For an unsigned pamphlet:

16. For an interview:

17. For a personal letter:
   27. *Fred to Morris*.

18. For a play:

EXAMPLES OF BIBLIOGRAPHY STYLES

FOR A BOOK BY ONE AUTHOR:


FOR A BOOK WITH TWO OR MORE AUTHORS:


FOR A BOOK WITH NO AUTHOR'S NAME GIVEN:

EXAMPLES OF BIBLIOGRAPHY STYLES, Continued

FOR A BOOK THAT IS EDITED OR A CRITICAL EDITION:


FOR AN ANTHOLOGY:


FOR A BOOK IN A SERIES:


FOR AN ENCYCLOPEDIA ARTICLE:


FOR A SIGNED MAGAZINE ARTICLE:


FOR AN UNSIGNED MAGAZINE ARTICLE:


FOR A SIGNED NEWS STORY:


FOR AN UNSIGNED NEWS STORY OR EDITORIAL:


FOR A SIGNED PAMPHLET:


FOR AN UNSIGNED PAMPHLET:

EXAMPLES OF BIBLIOGRAPHY STYLES, Continued

FOR AN INTERVIEW:


FOR A PERSONAL LETTER: