

PREPARING DOCUMENTS FOR DECISION-MAKERS

Professional Development Course Book

For the Department for Education

Presented by Mark Priadko

# IPAA Personal Membership

Become part of the IPAA SA Personal Member community and access an extensive range of benefits, opportunities and support for your career.

**Personal Membership Will…**

**Get you future ready**

We will improve your career as we educate and inform you of what’s to come in the future of the profession and build your skill set to ensure you are ready for it.

**Build your capability**

We will build your current capability to ensure you perform at the best of your ability and get you ready to face every new challenge throughout your career.

**Champion you**

We will champion your successes and voice them to the sector.

**Build your networks**

We will build your networks and connect you to like-minded people, people facing the same challenges as you and people who can help you to gain influence and penetrate the vast public sector.

**Connect you**

We will connect you with ideas from across the country through our National body and State jurisdictions.

**Support you**

We will provide you with tangible support throughout your career.

**More benefits**

* Extensive discounts on IPAA SA training, courses, forums and events.
* Access to exclusive member opportunities, such as our mentorship program and networking sessions.
* Receive resources and learning opportunities relevant to your career level.
* Receive a membership certificate for your CV and use of the MIPAA post nominal.
* Unlimited digital access to the Australian Journal of Public Administration.
* Receive a training voucher to the value of your membership.
* Have your say in IPAA SA governance.

**How to join?**

Joining is as easy as visiting our website: [www.sa.ipaa.org.au/membership](https://sa.ipaa.org.au/membership/). Navigate to the Membership section and select the membership type most applicable to you and fill in your details online. Membership fees are generally tax-deductible.

If you have any questions about membership, contact us on 8212 7555 or email membership@sa.ipaa.org.au

### Self-evaluation

* My proficiency in preparing documents is:

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** |  |
|  |  |  |  |  |  |  |  |  |  |  |  |
|  | Low |  |  |  |  |  |  |  |  | High |  |

List of what I need to know to move up one point on this scale.

* .......................................................................................
* .......................................................................................
* .......................................................................................
* .......................................................................................

### Session overview

* The purpose of our documents
* Understanding our audiences and what decision-makers want – beware the curse of knowledge
* Document structure and our narrative - Narrative is the choice of which events to relate and in what order to relate them.
* How we go about writing - Beware of 90% complete but 50% to go

# Table of Contents

[The purpose of our documents 5](#_Toc168774722)

[Beware the curse of knowledge 6](#_Toc168774723)

[Make a commitment to the concrete 7](#_Toc168774724)

[Converting from our language to plain language 8](#_Toc168774725)

[Some thoughts from Writers that write about writing 11](#_Toc168774726)

[What decision-makers want 12](#_Toc168774727)

[Distinguishing content and method 14](#_Toc168774728)

[How we arrange content – narrative structures 15](#_Toc168774729)

[Narrative Structures 16](#_Toc168774730)

[Pyramid Structure for information reports (Telling) 17](#_Toc168774731)

[PRAISE as a balanced narrative structure 17](#_Toc168774732)

[Beware paralysis by analysis 19](#_Toc168774733)

[Method – How we go about writing 20](#_Toc168774734)

[Beware 90% complete but 50% to go 20](#_Toc168774735)

[Rethinking our use of time 22](#_Toc168774736)

[Managing Time – Author as Project Manager 23](#_Toc168774737)

[First (your) draft – Second (their) draft – Third (quality) draft 24](#_Toc168774738)

[Initiate a midpoint review 25](#_Toc168774739)

[First half - Create volume, build knowledge and form a view 26](#_Toc168774740)

[Second half - Switch from volume to quality and write what you know 27](#_Toc168774741)

[Editing 28](#_Toc168774742)

[Summarisation 31](#_Toc168774743)

[References 33](#_Toc168774744)

[Appendix 1: Present gaps to reveal/discover 34](#_Toc168774745)

[Appendix 2: Degrees of separation and readability 37](#_Toc168774746)

[Appendix 3: Executive summary 40](#_Toc168774747)

### Activity

Please put yourself in the position of an Executive with the authority to make decisions about funding and recruitment.

I have prepared a briefing for you to consider called ‘***Assessment of a review to appeal’***.

Please read the briefing.

In groups discuss your observations, critiques and questions.

## Ways to improve the assessment document

### Intent

It is not clear what the document seeks from its reader. Do they want approval, endorsement, noting or something else from the reader?

It should be made clear quickly what is being sought from our readers and what the purpose of the document is. This will often be made clear in templates.

### Change the structure and length of the document

It takes too long to get to the point. The reader or decision-maker does not know what is required of them until the end.

The document goes into some detail that is easy for the reader to get lost in. Remember, the approver may not be as familiar with the detailed workings of the policies as the author. The author suffers from a curse of knowledge – they know more about the subject than the reader does.

The document needs to be summarised so the reader can get to the conclusions quickly, but also have the detail to support the decision as additional information. This requires reorganising the document into a different sequence where conclusions are presented earlier.

### Increase the use of plain language

The document could be improved by adopting some principles of plain language including

* Use of passive voice that could be converted to active voice
* Use of constructions based on nouns that could be converted to verbs.
* Preferring short sentences over long
* Less ambiguity about the subject or object.

### Group Discussion

Who are we writing our briefings for and what do we think they are seeking from the briefings they receive?

# The purpose of our documents

Documents and reports to leaders and executive groups will have one of three basic purposes:

1. To provide assurance
2. For discussion
3. For decision-making.

The distinguishing feature between these reports is the nature of change and action arising from them.

|  |  |  |
| --- | --- | --- |
| No change required | Change required but how is not yet clear | Change required and understood |
| **Inform, Assurance** | **Discussion** | **Decision Making** |
| *More telling**Can use infographics* | *OPTIONS*  | *More revealing/discovery**Use well understood graphics* |
| Recommends - Noting | Recommends – direction for further work | Recommends – action to implement change |

### Information/Monitoring

Reports designed for this purpose let leaders know that previously approved projects or changes are on track. Information documents are designed to provide leaders with assurance and will usually recommend that the reader note the contents of the report and will not demand any approvals or recommend any new action.

**Examples** will include status reports on finances, operations, and compliance reports where progress is within acceptable tolerances and no decision-making or action is required of the recipients.

### Discussion Reports/Papers

When an issue has arisen that will ultimately require a change in the way a service is delivered or in policy, but the detail of the change is not yet fully developed a discussion paper can be provided to examine current opinion and evidence on the issue. This type of report should make recommendations on what further work or steps are required to get a resolution or to be able to recommend the specific changes that are required.

Discussion papers may be necessary for controversial, complex or high-risk issues where there is no clear solution apparent at the time or for issues that are of a large scale that involve careful consideration in the development of options and before a final decision is made.

Examples will include reports on matters of strategic importance like changes in the business model, policy changes, adding or cutting services or major investment projects that need to be discussed amongst leaders before a final decision is made.

### Make the Decision

If an organisation is dealing with problems where research has been made into the changes necessary, executive teams will rely on advice as to how to go about dealing with problems or making changes. In this respect, reports provide the information necessary to prompt and support decision-making. Reports designed to prompt or support decision-making will make recommendations that seek approval to make changes or undertake new work.

**Examples**: Proposals for organisational initiatives or campaigns, business cases to proceed with a project, recommended changes in policy, findings and recommendations from a service or functional review.

# Beware the curse of knowledge

The curse of knowledge is a cognitive bias that occurs when an individual, communicating with other individuals, unknowingly assumes that others have the background to understand. The curse of knowledge (along with limits on document length) explains the lack of background or context provided to our readers. It can also explain why we improperly use jargon or technical terms.

When we learn how to write, we write to prove our knowledge and we learn to write to our teacher, someone who has more knowledge than us – we presume knowledge.

If we were to represent where the writer (as a learner) is relative to the reader (the teacher) on a scale of the extent of subject matter knowledge we would show it as follows.

We write to demonstrate that we are bridging this gap

|  |  |  |
| --- | --- | --- |
| Writer (learner) |  | Reader (teacher) |
| **Lower** | Extent of subject matter knowledge | **Higher** |

In this relationship, we do not have to engage our reader and the reader’s motivation is taken for granted. We also take for granted that they have subject matter expertise and therefore we do not need to introduce them to the subject.

This changes at work. This changes with advisory work. At work, we are often in positions where we have researched a subject or developed policy on a subject such that our subject matter knowledge is usually in advance of those we write to.

We write to help our reader bridge this gap more quickly than we did

|  |  |  |
| --- | --- | --- |
| Reader (decision maker) |  | Writer (technical leader) |
| **Lower** | Extent of subject matter knowledge | **Higher** |

Now we are writing to inform our readers about something they know less about or to convince them of the need to change something. The reader is likely to have some subject matter knowledge, but now, we as the writer are likely to have more and deeper subject matter expertise and technical knowledge.

Another aspect of the relationship changes at work. When we prepare a document for a staff member more senior than us, there is another element to the relationship – their breadth of responsibility. The reader will usually have a greater breadth of responsibility than us.

Now we can represent the relationship as follows.

|  |  |  |  |
| --- | --- | --- | --- |
| **Higher** |  | Reader (leader/decision maker) |  |
| Breadth of responsibility |  |  |  |
|  |  | We write to help our reader bridge this gap |  |
| **Lower** |  |  | Writer (technical leader) |
|  | **Lower** | Extent of subject matter knowledge | **Higher** |

## Make a commitment to the concrete

*“When we know something well, we don’t realise how abstractly we think about it… We need to slice away abstraction and show the reader who did what to whom.”* Stephen Pinker. Showing ‘who did what to whom’ means using more concrete language.

Concrete nouns name things you can identify through one or more of the 5 senses. They are people, places and things that can be seen. Examples

* building
* phone
* computer
* person

Abstract nouns name intangible things, things that cannot be seen. These include ideas, emotions and physical feelings. Examples

* honesty
* reliance
* engagement
* admiration

Nutritionists think about body mass index and food consumption. They might say:

*“There is a significant positive correlation between measures of food intake and the body mass index.”*

We might prefer - *The more you eat, the heavier you get*.

The audiologist might say

*Participants were tested under conditions of good to excellent acoustic isolation.*

We might prefer - *We tested the students in a quiet room.*

A security firm might day – *we believe our approach to delivering integrated solutions, combining effective manpower, canine services and cutting-edge technology is a key differentiator in the selection process*

We might prefer – *They chose our company because we protect buildings with a combination of guards, dogs and sensors.*

Our case includes the following sentence.

*The Department for Education's Inclusive Education Support Program (IESP) is a functional needs-based funding model for preschool and school students with a disability.*

The concept of a funding model is abstract. The adjective “functional needs-based” adds to the complexity of the term. Money is a more concrete term.

*Money for preschool and school students with a disability is allocated to schools based on the needs of the students in each school. This money is provided through the Inclusive Education Support Program (IESP).*

## Converting from our language to plain language

Suggestions that can help convert our writing from our own style to plain language include:

* Use more familiar and everyday words
* Be more precise by removing unnecessary words
* Vary sentence length
* Prefer active voice to passive voice
* Use verbs in preference to constructions based on nouns derived from verbs
* Break up dense strings of nouns
* Avoid clichés
* Clarify jargon, acronyms and initialisms

### Use more familiar and everyday words

Rather than - *You are required to disclose financial documentation in a timely manner or you will be deemed to be disqualified from this prize offer.*

Try - *Email your receipt by 5 pm today to claim the prize.*

### Be precise by removing unnecessary words

Rather than – *One of the best things you can do for yourself to improve your writing is to learn how to cut out words that are not necessary*.

Try – *Removing unnecessary words improves writing.*

### Vary sentence lengths and prefer short sentences over long

Too many sentences of the same length can become monotonous for readers. Short sentences can be used to make important points. Too many short sentences can make the reader’s experience choppy and disconnected

Long sentences can be used to convey higher volumes of information and for more description of a subject or situation. Too many long sentences will test your reader’s memory. Readers can get lost in long sentences.

For our example

*“Prior to her interview, the preferred candidate was in possession of Training Unit documentation that she did not have the appropriate security clearance to possess and the possession of such correspondence provided her with an unfair advantage over the applicant.”*

This sentence can be shortened by converting it into two sentences.

Before the interviews, the preferred candidate had Training Unit documentation that she did not have the appropriate security clearance to possess. The possession of such correspondence provided the preferred candidate with an unfair advantage over the applicant.

### Prefer active voice to passive voice

To explain the difference between active and passive verbs, we need to look briefly at how a sentence fits together. There are three main parts to almost every sentence:

* A **subject** (the person, group or thing doing the action);
* a **verb** (the action itself); and
* an **object** (the person, group or thing that the action is done to).

To give an example, in the sentence “The Government increased the pension rate”:

* The **subject** is Government (it is doing the changing);
* the **verb** is increased; and
* the **object** is the pension rate (it is being changed).

There will often be other words in the sentence. For example: *The recently elected Government increased the pension rate in response to pressure from seniors’ groups*. But the subject, verb and object are still there.

**Active** – The Government increased the pension rate.

**Passive** – The pension rate was increased by the Government.

For our example, *“On Monday 19 September 2022, an appeal to review the selection process was submitted by Ms Doe for the above position.”*

This is a passive sentence.

The subject is Ms Doe and the object is the appeal to review. In a passive sentence, the object has something done to it by the object. The word ‘by’ is often present.

The active version of this sentence would change the sequence of words to have the subject (Ms Doe) doing something (submitting) to the object (an appeal to review).

*“On Monday 19 September 2022, Ms Doe submitted an appeal to review the selection process for the above position.”*

### Use verbs in preference to constructions based on nouns derived from verbs

*Explain* rather than *provide an explanation*

*Apply* rather than *make an application.*

For our example

*“She submitted an application for the position of…..”*

Should be

*“She applied for the position of……”*

### Break up dense strings of nouns

Rather than – The human resource reallocation analysis will inform our business plan.

Try - The goal is to understand how we can reallocate human resources. The analysis will inform our business plan.

Rather than - *The agency’s new system will help in the achievement of injury management outcome improvements.*

Try - *The agency’s new system will help to improve how it manages injuries.*

### Avoid clichés (e.g. – “What goes around comes around” or “can of worms”)

Clichés are often specific to groups or cultures and may be a barrier to readers outside the group or culture. Some older clichés have been repeated for so many years that the original reference may be out of date and irrelevant.

### Clarify jargon, acronyms and initialisms

Jargon is special words and phrases that are used by particular groups of people. In teaching, pedagogy could be considered a form of jargon. In finance, an accrual could be considered a form of jargon. The term journal has a specific meaning in finance. The terms or their specific meaning are not well understood outside the professions.

An acronym is an abbreviation formed from the initial letters of other words and pronounced as a word. Examples include the National Aeronautics and Space Administration (NASA).

An initialism is an abbreviation consisting of initial letters pronounced separately. Examples in the Australian Bureau of Statistics (ABS).

In converting our writing we need to be careful to spell out what we mean by these terms and not presume our reader understands them.

### Answer rather than respond

An answer is a specific and final response to a question or problem. An answer to a question or query is more direct and to the point.

A response is a reaction or reply to an action, situation, or stimulus. A response is a more general and flexible reaction. Responses can be interpreted as trying to avoid a question, being vague or being ‘roundabout’ in getting to the point.

It may be our natural style to respond first and then have to work to be more direct in crafting an answer.

### Ambiguity of subject

A tailor's guarantee: If the smallest hole appears after six months' wear, we will make another absolutely free. The failure is ambiguity in the subject of the sentence.

***Should be:***

If the smallest hole appears in your garment after six months wear, we will make another garment absolutely free.

**Lost:** Wallet belonging to a young man made of calfskin. Again, we need to better link clauses to subjects.

***Should be:***

Wallet made of calf skin, belonging to a young man.

For our example, the initial reference to “prior to her interview” creates confusion. Whose interview does it refer to? Both the applicant and the preferred candidate were female. Does the sentence refer to the applicant to the appeal or the successful candidate?

## Some thoughts from Writers who write about writing

### Use active verbs more than passive verbs.

Active verbs push the reader along.

Passive verbs tug or drag.

Example Active – Joe saw him. This is short and direct.

Example Passive – He was seen by Joe. This is longer and more likely to be ambiguous.

### Beware overusing adverbs and adjectives

Adverbs help describe verbs. He walked. How did he walk? Adverbs quickly or slowly can be added to describe the walk.

Adjectives describe nouns. I met a man. What type of man? Adjectives like tall, short, rotund, cheery or sad describe the man.

William Zinsser states: “*Most adverbs are unnecessary…. Most adjectives are also unnecessary.”*

Most verbs and nouns have specific meanings that require no elaboration by adverbs or adjectives. Adverbs and adjectives can clutter and elongate our sentences.

### Beware of little qualifiers

Qualifiers include terms like ‘a bit’, ‘a little’, ‘sort of’. These dilute our persuasiveness. Zinsser states:

*“Don’t say you were a bit confused or sort of tired and a little depressed and somewhat annoyed. Be confused. Be tired. Be depressed. Be annoyed. Don’t hedge your prose with little timidities. Good writing is lean and confident.”*

### Credibility and overstatement

Don’t overstate points as they will impact the reader and will impact your credibility.

Further, Zinsser states:

*“Credibility is just as fragile for a writer as for a President. Don’t inflate an incident to make it more outlandish than it actually was. If the reader catches you in just one bogus statement that you are trying to pass off as true, everything you write thereafter will be suspect. It’s too great a risk, and not worth taking.”*

### Prefer short sentences and short paragraphs over long

The writer’s life is to craft good sentences that fit together to make good paragraphs. Good sentences can be short and to the point, especially with non-fiction. Short sentences can have authority and boldness. They exclude qualifiers and overstatements.

### Be aware of how we were taught to write

Most of us were taught to write at school without regard for the future contexts in which we would write. We were taught to write to prove ourselves – to pass the test to get a good grade on the essay.

At work we write to advise and to persuade. We do not need to prove ourselves. At work we write with the authority that emerges from our expertise and research. We lead others with our writing. We can stop proving ourselves.

## What decision-makers want

### Assurance - The hallmark of narrativity is assurance

“*The hallmark of narrativity is assurance. It lives in certainty. This happened then that; this happened because of that*.” Source: Narrative theory, Mieke Bal

Assurance is a general term for the confidence and comfort that can be derived from credible information. In information papers, they seek assurance that the work and situations within the paper are well managed and are under control. They want to take confidence from the information provided by the writer. In decision-making papers, they seek assurance that the decisions we are asking them to make have been well made. They want to make decisions confidently. They also want to make decisions that align with the goals and objectives of the organisation – their goals.

From experience working with decision-makers, and as a former decision-maker, I have concluded that for assurance that decisions are well made they want:

* context – what they are being presented with is relevant to their goals and outcomes
* evidence – that the document and recommendations provided are supported by well researched facts and data
* different perspectives – the views formed have taken into account a variety of perspectives to avoid possible biases from narrow views or agendas
* root causes – that the decision they are being asked to make has gotten to the root causes of any problems or the heart of any opportunities
* options – that the final recommendation made has been after consideration of a range of options (i.e. a well-researched choice has been made)
* solution details – the details of implementing the preferred solution have been thought through to ensure associated risks and costs are understood.

### Feedback from executives

* Be very clear in what you are seeking the decision maker to decide in your recommendations.
* “Don’t presume that I know what the issue is or that I know the background to the issue”.
* Beware basic grammar and spelling errors – it suggests a lack of attention to detail creating concern that the content also isn’t correct.
* “No personal views or biases please. Decisions need to be made based on facts.”
* Submit things early and engage with the right people when preparing the briefing to support and help you write it. Ask for help if you are not clear about what you’re being asked to do.

Decision makers see our writing as evidence of the quality of our thinking.

### Time poverty

The more senior our readers, the more time-poor they will be. They will demand brevity.

However, the demand for brevity due to time poverty can result in confusing what they will read versus what they need for good decision-making.

While a busy Minister, CE or executive may not read your entire report, they do want to see that good evidence has been assembled and thought through. They may not read a long report, due to time constraints, but they want to know that a decent report has been produced to enable them to defend the decision they make and to ensure others are able to critically analyse the work.

See handout 2 for an alternate version of the assessment document.

#### Activity 2:

The Office for Case Management is a statutory office operating within the department. The Office for Case Management’s roles and responsibilities of the team are well defined. The work they do is: Case management, investigations and attending to public enquiries.

The team and their leaders are struggling with their work and are experiencing high levels of stress. They have raised this with senior management and made a plea for additional resources to address their situation.

Senior management in the Department is not convinced that additional resources are required and believes there could be other reasons why the team is struggling with their work and experiencing high levels of stress

The dispute between the Office for Case Management and the Department escalated to the point of there being a high risk of an industrial dispute with staff complaining about stress from extreme workloads.

A paper was presented to the Senior Executive Group recommending that an independent review of the Office for Case Management be conducted.

**Group 1:**

What information would we expect to be included in the report?

How would you go about conducting the review and preparing the report?

**Group 2:**

The review has reached the point of providing a draft report (handout 3).

We have been asked to provide a briefing to the CE on the status of the review.

What information could be included in the briefing?

How should we go about preparing the briefing?

# Distinguishing content and method

It is worth distinguishing between the content of the work we are doing and our method or process for doing it.

The **content** of our work relates to the research and the findings of the Office for Case Management. Content relates to the details to be included in our document.

The **method** of our work relates to how we choose to go about preparing our document. Method relates more to the process that we follow in our work and how we manage our time.

As an author of a complex document, I will need to have an eye on both content and method. Understanding the content of the document is no guarantee of the preparation of a good document. Too often, good writing is compromised by the poor management of time rather than by the expertise and content knowledge of the author.

### Analogy - Anablep

Anableps are a genus of four-eyed fishes. They have eyes designed to see below and above the water surface at the same time. In our work, we need to have an eye above and below the surface of our work. Above the surface is the content. Below the surface is our method or approach.

‘Below the surface’

**Method**

‘Above the surface’

**Content**

# How we arrange content – narrative structures

*“Narrative is the choice of which events to relate and in what order to relate them – so it is a representation or specific manifestation of the story, rather than the story itself.”*

Source: http://beemgee.com/blog/story-vs-narrative/

*“The concept of narrative deals more with* ***how*** *the events are told. Narrative is the ordering of events into a consumable format.*

*…… narrative is the method and means by which you construct the events of a story into a plot. It concerns itself with the sequence of the events, the medium on which they are told and the way these events are put together into one coherent unit*.”

Sourced from: http://hacktext.com/2011/09/story-vs-narrative-vs-plot-1205/

Narrative is the way the author or speaker chooses to structure events — the architecture of the story, comparable to the design of a building. Ultimately a narrative is a way of organising the information of a story, strategy or proposal that helps it engage a reader and make sense to a reader or listener. While a story is a sequence of events, the narrative recounts those events in its own way to emphasise some aspects of the story to enhance its impact.

There is a greater array of possibilities for the fiction narrative structure to invoke the imagination of the reader/listener, to create surprise, mystery and intrigue. For non-fiction narratives, the variety of structures available to us will be more limited. There will tend to be greater reliance on more straightforward and logical structures, although surprise and intrigue can still be used, their use will be more limited.

### Narrative choice – Write to tell or write to reveal and discover

A dilemma for a writer is to make choices about the extent to which we tell our readers the story or have the reader discover the story.

When you write to tell rather than write to discover you get straight to the point and present conclusions rather than allowing the reader to deduce anything.

When you tell you will present findings first and support them with facts and data second.

When you write to reveal (for the reader to discover), you will present facts and data first and findings and conclusions second. Revealing and discovery will present the reader with some information in a particular order and in an open-minded way enabling the reader to draw a conclusion(s). Discovery requires more structure in our writing. When you write to discover and write to reveal rather than tell, you make the reader part of the experience.

Each has its place.

Telling has the advantage of being direct and more succinct.

Telling works well when all you need to do is inform someone.

Telling has the disadvantage of being less engaging.

Discovery works well when we need the reader to ‘understand’ the conclusion of the document by having them draw the conclusions themselves. This means withholding judgement in our writing allowing the reader to draw conclusions. Discovery writing can also demonstrate an open-mindedness on behalf of the writer.

## Narrative Structures

Some examples of basic non-fiction narrative structures:

* Past – Present – Future
* Beginning – Middle - End
* Why, what, how and what’s next
* Context – Discussion – Findings – Recommendation.

Most organisations will establish document templates that will prescribe the order and sequence of what we write.

### Department for Education templates

The department’s Chief Executive Briefing template has the following structure

* Recommendations
* Purpose
* Background
* Key Points
* Financial implications

The link to this template and others is:

<https://edi.sa.edu.au/operations-and-management/communications/templates-briefings-and-correspondence/ce-briefings-and-correspondence>

The Department for Education also has a project business case template that can be found at:

<https://edi.sa.edu.au/operations-and-management/legal-and-projects/project-and-change-management/initiation-project-phase-1>

The structure of this document is:

* Executive summary
* Background
* Analysis of options
* Overview of the recommended approach
	+ Objectives
	+ Strategic alignment
	+ Outcomes
	+ In scope
	+ Out of scope
	+ Critical assumptions and constraints
	+ Links to other projects or initiatives
* Deliverables and milestones
* Project governance
* Costs
* Stakeholder analysis

More detail on two structures follows:

* Pyramid structure for information papers
* PRAISE as a narrative structure.

## Pyramid Structure for information reports (Telling)

This structure for information reports is designed to ensure time poor decision-makers are firstly provided with summary information and conclusions and then gradually introduced to increasing levels of detail that explain the results and support the conclusions.

An example for a finance report is below.

First breakdown – organisation presented by team or by revenue and expense category

Whole of organisation totals and main conclusions

Second breakdown – detail for each team, unit or project by line item

Details of matters that support the finances (e.g. FTEs, activity levels, relevant transaction details)

## PRAISE as a balanced narrative structure

The PRAISE narrative structure is designed for reports or briefings that require the reader to be convinced of a need to change and act differently.

The centrepiece of this narrative structure is that a change is needed and the reasons to support the change have been researched and understood.

The PRAISE narrative structure is designed to support decision-making by guiding the reader towards insights that reveal the need for, and the reasons for, change in an organisation.

PRAISE is an acronym consisting of:

1. Purpose - To make a story relevant and interesting it needs to be relevant to a goal or quest. It needs a purpose relevant and important to the reader/audience.
2. Recent History - The reader needs some context or background to whatever issue or problem it is we are dealing with
3. Analysis – we want to demonstrate evidence that will lead to our conclusions.
4. Insight – what we conclude from our analysis that helps the reader achieve the resolution of a problem, to progress their goal or to receive assurance that everything is OK.
5. Strategies (packaged solution) – what do as a result of our insight. Do we need to change or do we need to continue on our current path?
6. Execution Plan (next steps) – instruction as to what should happen next. Steps to take if we need to change or nothing if we do not need to change.

The PRAISE narrative structure can be presented as guiding our reader’s thinking process in the following diagram

**General**

**Specific**

Purpose

Recent History

Analysis

Insight

Strategy

Execution

**Proceeding decisively**

Dive into detail

Slow down to diagnose

Create the strategy

Elaborate on the strategy

Establish an overview & purpose

**Problems or opportunities**

**Solutions**

PRAISE is designed to guide a reader’s journey through a document so they get a reasonable balance of general and specific information and to ensure more detailed data and analysis are ‘balanced’ by more general information.

Writing prepared by staff with analytical and technical expertise tends to give more emphasis to the detailed, specific elements of their story. The majority of data is found in the history and analysis sections. Data is necessary, but too much will cause the reader’s experience to be imbalanced.

The method seeks to employ storytelling approaches:

In storytelling terms:

* The purpose section presents a quest or goal that matters to the reader. This is an important means by which to involve them in this story. It will impact their goals or the goals and outcomes by which they will be judged. We are using the goals and outcomes as a means to engage with our readers and decision-makers.
* The recent history and analysis sections build tension by showing gaps, issues and opportunities based on credible evidence. These sections should guide our readers to reveal a need for change and the reasons for it***.***
* The insight section provides the reader/decision maker with a breakthrough(s) that leads naturally towards the strategy section establishing strong links between what is wrong and what will be proposed as a strategy or solution.
* The strategy and execution sections provide a resolution and ‘how-to’ steps that lead to a ‘happily ever after’.

An example of the application of the PRAISE model is the draft report for the review of the office for case management.

## Beware paralysis by analysis

A document that is prepared with an imbalance of information interferes with the reader’s journey because they can be overwhelmed by the volume and details in the analysis we present.

It is not uncommon for studies and technical documents to devote a lot of attention to the analysis section. Without a purpose, there may be no point in the reader reading and without a proper background, it is not clear what has led to their being a study in the first place.

**General**

**Specific**

Analysis

Strategy

Execution

The reader gets lost in detail

**Problems or opportunities**

**Solutions**

Too little context or background is provided as we quickly dive into the detail of our work

Too much space is devoted to analysis leaving too little space for other aspects of thinking

This affliction also sees an imbalance between general and specific information. General information can provide context and relevance that engages leaders and decision-makers while specific information provides details that add credibility to the work. Too much detail and not enough context can be disengaging.

# Method – How we go about writing

## Beware 90% complete but 50% to go

I have heard authors use the phrase – I thought I was 90% complete but I had 50% to go.

We can think we are ninety per cent complete when we have done a large amount of research and data analysis and developed a coherent narrative. We have understood our issue and put a good volume of words to paper.

With the benefit of hindsight, it is at this point that authors realise the extent of gaps in their work. The need to do more research, the need to edit and improve what we have written and the need to cull writing to make it tighter and more succinct. However, if there is only 10% of the time left, we will not be able to fix many gaps or make many improvements to what we have written.

To provide an example – I was asked to assist a group of engineers in a project for a local council. The council sought to engage the engineers (via tender) to conduct a review of greenhouse gas emissions in the council and to produce a report that included recommendations on what the council could do to reduce greenhouse gas emissions. The engineers won the tender based on their capability and experience in modelling greenhouse gas emissions and their access to data from similar work across the world.

The project was contracted to commence in October and be completed by 31 January. These dates were known in the tender and agreed upon in the contract.

The engineers set about their research and modelling work with gusto. It became clear that this was their focus with less emphasis on the preparation of their final report. When asked about when they would prepare their report, the response was consistent: “We will prepare the report once we have done the modelling”. Their focus was on content.

Without being explicit, we can interpret a method – do the modelling first and prepare the report second. When asked when they plan to prepare the report, the answer was “after Christmas”. This method can be characterised in the diagram below.



Two features worth highlighting. The method is a linear sequence. That is, the writing of the report will wait for the data and modelling work to be complete. The second is that 75% of the project is devoted to the first task and 25% to the second.

Once Christmas came around, the engineers discovered they were not as far progressed in their modelling as they would have liked. That work continued into January. The writing of the report was squeezed into a couple of weeks. What happened can be characterised by the diagram below.



They met their deadline and produced a 110-page report on the 31st of January. For them, it was mission accomplished. We can now observe that they spent 88% of their time on data gathering and modelling and 12% of their time writing the report.

This method compromised the report.

* The report was imbalanced with 98 pages of data and modelling presented with high-quality tables and graphs. It was a tortuous read.
* The report did not contain recommendations, but rather suggestions about what the council could do to reduce emissions.

The receivers of the report were unimpressed. It did not meet their requirements.

This was a case of method compromising content.

The engineers had good data, they did high-quality modelling and they uncovered some good information. They had a good story to tell. They did not tell it well.

Some observations about this method.

* It followed a linear sequence – the engineers waited to write.
* Their method suggested that their understanding of the story was what should occupy the majority of the time (88%).
* The method allowed too much time for understanding the issues and not enough time for formulating solutions and recommendations.
* The method resulted in an ‘imbalanced’ report with too much data and analytical information. In effect, the majority of their report should have been an appendix.
* Their allocation of time required them to get the report ‘right the first time’. They did not allow time for significant re-work. They effectively gave themselves one shot at the report.

The method employed by the engineers would not be unique to them.

The author thinks they are nearly finished (90% complete), but realise they need a lot more time and effort to produce a professional final product. Based on the feedback received by the engineers, the material also needs to be converted into language that better suits the reader. That included converting jargon and technical language into plain language that better suits our readers.

When they thought they were 90% complete, it turns out they had 50% to go.

This was ultimately the experience of the engineers. For their invoice to be honoured they were required to revise and resubmit the report. It took them until the end of March. It turns out that when they thought they were 90% complete (around mid-January) they had 50% to go.

### Activity

Construct a list below of what we need to allow time for in the development of our content and the production of our document.

## Rethinking our use of time

I believe a root cause of shortcomings in documents prepared by technical experts is a failure to properly allow time for what is needed to prepare a good quality document.

Recalling the issue of 90% complete with 50% to go, it is not uncommon to underestimate the time required to edit and improve. We can also underestimate the time required to convert our document into a language that better suits the reader. That includes converting our jargon and language into plain language that better suits our readers.

In producing documents and reports we can avoid failures inherent in the method used by the engineers. To do so we need to set aside some myths and change some practices.

Firstly, it is a myth to expect to get the document right the first time. Experienced authors reflect on their experience and acknowledge that revision and re-writing are the essence of good writing.

*“Actually, the essence of the process is revision.”* Source: John McPhee, Draft No. 4

*“Re-writing is the essence of writing well.”*

*“We all have an emotional equity in our first draft; we can’t believe that it wasn’t born perfect. But the odds are close to 100% but it wasn’t. Most writers don’t initially say what they want to say or say it as well as they could. The newly hatched sentence almost always has something wrong with it.”* Source: William Zinsser, On Writing Well

*“Too many things have to go right in a passage of writing for most mortals to get them all the first time. It's hard enough to formulate a thought that is interesting and true. Only after laying a semblance of it on the page can a writer free up the cognitive resources needed to make the sentence grammatical, graceful and most importantly transparent to the reader.”*

*“The form in which thoughts occur to a writer is rarely the same as the form in which they can be absorbed by a reader. The advice in this and other stylebooks is not so much on how to write as on how to revise.”* Source:Stephen Pinker – The Sense of Style pg. 76

Secondly, replace linear sequencing with concurrency and don’t wait to write. The engineers seem to have it in their mind that they couldn't write their report until they had finished their data analysis and modelling. We can build our document with content from the very beginning of the project. The early drafting does not need to be perfect but it can see a document evolve over the life of the project.

Thirdly, be explicit about the time required to produce a final document, in particular for the time needed for all the ‘re-‘ words. This is at the heart of the insight – 90% complete but 50% to go. The drafting and the re-work should occupy a considerable proportion of the time.

Based on the need to realise when there is 50% to go earlier, instigate a mid-point review point that recognises when the conclusions from data analysis and modelling should be largely completed halfway into the work.

## Managing Time – Author as Project Manager

To manage our time, we need to think like a project manager.

* Break our work into the range of tasks required
* Plan the sequence of events and the dependencies between events and
* Be explicit about how we are allocating our time

What are the tasks that require time for the development of content and the production of the report:

|  |  |
| --- | --- |
| **Tasks** | **Engineers** |
| Project planning and initiation | P |
| Identifying data requirements and data sources | P |
| Data gathering and research | P |
| Interviews and consultation | P |
| Analysis of information gathered | P |
| Initial drafting to capture ideas and thoughts | O |
| Follow-up data gathering | P |
| Follow-up analysis | P |
| Draw conclusions | P |
| Further drafting to document findings and ideas | O |
| Formulate strategies and solutions | O |
| Preliminary planning for implementation of solutions | O |
| Summarising and visualising data to present | P |
| **(MID POINT REVIEW)** - Establish a detailed narrative structure  | O |
| Seek feedback on the detailed narrative structure | O |
| Follow-up information gathering (if feedback requires) | O |
| Follow-up analysis (if feedback requires) | O |
| Detailed planning for implementation of solutions |  |
| Detailed drafting of the report | P |
| Reviewing and editing first draft | P |
| Fact check and quality assure data | P |
| Reword | P |
| Rewrite | O |
| Refine | P |
| Reorient towards the reader | O |
| Proofread for a second draft | P |
| Seek external feedback on the second draft | O |
| Revise | O |
| Redraft | O |
| Reword | O |
| Create a summary of the report (Executive Summary/Abstract) | O |
| Review the third draft | O |
| Revise (again). | O |

## First (your) draft – Second (their) draft – Third (quality) draft

The tasks above acknowledge that there will be at least two drafts of the document.

The first draft tends to be ‘writer-centric’. It is a version of the story written as the writer sees the issues. The changes between the first draft and the second draft will include revisions, rewording, and reorienting the material towards the reader. The initial stages of drafting start with more information than will be in the final version. As the process goes on, it is one of deletion through reallocating information from the body of the document to attachments or a discard file.

The second draft is more likely to be the document that is better focused on the reader’s perspective. The more technical our topic and the more specialist the writer the longer the time needed for this phase of the work. There can be considerable re-work required from the first draft to the second draft.

It is the second draft that can then become the basis for seeking feedback and creating a summary that will lead to the third draft.

Having identified the range of tasks and the need for a midpoint review, we can consider the timing for each of the tasks and develop our own timetable for the preparation of our document



## Initiate a midpoint review

The ‘90% complete but with 50% to go’ insight into the process of writing has led me to initiate mid-point reviews as part of my writing process. The mid-point review is established at the beginning of projects where there is a hard deadline. The midpoint review is an opportunity to test your thoughts, your sequencing and your findings with your reader in the early stages of document preparation.

*“To escape the curse of knowledge, we have to go beyond our powers of divination. We have to close the loop and get a feedback signal from the world of readers. That is, show a draft to some people who are similar to our intended audience and find out whether they can follow it. ……Only when we ask those people do we discover that what's obvious to us isn't obvious to them.”* Source: Stephen Pinker pg75

An example occurred with a government client that, in early October, wanted to prepare a business case by 31 January (16 weeks away) to submit it as part of the annual budget process. When I met with them in early October, we established a mid-point review date of the end of November. This broke the document production process into two halves.

The mid-point review is designed to force large amounts of research, thinking, and drafting work into the first half of the writing project. We did this with the business case and at the end of November had developed the initial workings of a coherent case that was discussed with leaders and recipients. We were able to test the logic of the argument in the business case and the quality of the evidence supporting the business at that midpoint. The second half of the project was able to spend time on detailed drafting with focus, knowing the way the document would flow and allowing time to focus on the quality attributes of the document. Rather than rushing in the second half of the process, there was an orderliness to the editing, rewriting and production of the document. A draft business case was prepared by mid-January and a final business case was produced by the 31 January deadline.

This broke the document production process into two halves.

1. The first half is about creating volume and forming a view of the subject matter. It starts by establishing the structure and capturing as much information as possible into an initial draft of our report. Capture as much information as is available for each of the sections in the structure. In the early stages of the writing process, we do not need to be fussy. There is no need to be too discriminating. More is better. Information collected helps us get to know the subject and options for how to write about it. The first half culminates with a midpoint review.
2. The second half is a switch to quality with more detailed drafting, editing and revising of the document. This allows time for wordsmithing, spelling and grammar checking, consistency of formatting and receiving feedback from superiors on draft versions.

## First half - Create volume, build knowledge and form a view

It starts by establishing the structure and capturing as much information as possible into an initial draft of our report.

Capture as much information as is available for each of the sections in the structure. In the early stages of the writing process, we do not need to be fussy. There is no need to be too discriminating. More is better. Information collected helps us get to know the subject and options for how to write about it.

The amount of information you need to include depends on the quality of your insights. If your insights are clear and strong, you will need less information than if your insights are still being formulated as you write. By the way, it is OK for your insights to develop and evolve as you write.

If your insights are still developing, grab and include as much information as possible.

The development of a clear and strong insight(s) will see a good narrative develop. The narrative will help develop key themes and layers of information that will be included in each section. From this, you will be able to form the subheadings that will go into each chapter.

Productivity for this component will be enhanced by:

* Touch typing
* using dictation applications to get material into your notes
* writing in sections – when you hit a block on one section, start writing another
* beware of perfection, it can be the enemy of production - Be careful to strive for perfection early by over-editing material as you are creating it.

I focus on volume in the early stages of writing because the best pieces of writing come out with the bad pieces of writing. Some might say, the more bad stuff we write, the more good stuff we’ll write.

#### We need to confront writer’s block

Writer’s block occurs when we face the page but no words come out. From my own experience and from hearing the experiences of others, I believe writer’s block is symptomatic of wanting to write perfectly. We will not write unless only good writing comes out. This is premature perfection.

The likelihood of experiencing writer’s block, and the anxiety associated with it, will be increased if you only give yourself one shot at writing like the engineers did.

Changing our approach to managing time gives us the ability to write imperfectly in the early stages of writing knowing we have allowed time to review, edit and revise our work at a later stage.

Writer’s block seems to occur when you only want good stuff to come out and therefore allow nothing out. The good and the bad usually come out together.

Another remedy for writer’s block is to write in sections. If you are experiencing difficulty writing one part of the document, move to another section of the document where the words flow more easily.

The initial stages of drafting start with more information than will be in the final version. As the process goes on, it is one of deletion through reallocating information from the body of the document to attachments or a discard file.

Another strategy to free up the mind in writing is to not delete any information. If you have too much information, do not delete information – reallocate it.

## Second half - Switch from volume to quality and write what you know

After a mid-point review where I establish clarity about the main elements of the document structure, I will work towards producing a minimum viable product. This is a switch from volume to quality. In the second half of the project I will need:

* Time to continue to write raw material
* time to wordsmith
* time to format the report, tables and graphs
* time to edit our writing and quality assure the material including the data
* time to quality assure the document – checking spelling, layout, grammar, headers, footers, footnotes, table of contents, Appendices, style consistency and numbering on the tables and charts
* time to produce an executive summary (for reports only)
* time for feedback from the client/recipient on draft copies.

It will often be the case that at the end of the first half of work, I will have too much information to include in the final document. The second half of the process will include culling information so the final document is more succinct.

If you have too much information, do not delete information – reallocate it.

Once you have greater clarity on your insights and your narrative you can start to weed out information that is peripheral to your main points. Do not delete them, move them as they may come in handy later.

The information we have gathered will end up in one of three places:

1. In our final document
2. In an appendix to the document
3. In a ‘discard’ file we establish to capture what we no longer require.

Information that may be more detailed and that has contributed to us reaching our insights but could distract the reader (including detailed history) can be relegated to attachments of our document.

Information, data and ideas that we have had along the way that have now proven to be not relevant can be reallocated to a discard file. They may become relevant later.

In the second part of the process, we are improving our document through relegation and reallocation rather than just by creation.

### Activity

“One of the best things you can do for yourself to improve your writing is to learn how to cut out words that are not necessary.”

Can you summarise the message of this sentence in seven words or less?

## Editing

*“Re-Writing is the essence of writing well.”*

*“We all have an emotional equity in our first draft; we can’t believe that it wasn’t born perfect. But the odds are close to 100% but it wasn’t. Most writers don’t initially say what they want to say or say it as well as they could. The newly hatched sentence almost always has something wrong with it.”*

Source: William Zinsser

Editing work can be broadly categorised into the following three tasks:

1. Substantive (or structural) editing – assessing the document as a whole for its content, structure, language and presentation.
2. Copy editing – More detailed editing for accuracy and consistency in language, style and layout
3. Proofreading – final checking to ensure the document is ready to send.

Source: *Style Manual*, Australian Government – Chapter 14.

Our ability to edit will be a function of:

* Our understanding of the styles and standards required
* the time we have allowed to it and
* our eye and ear for detail in finding errors.

### Use of style manuals or guides

“*Thinking about style is best left to the final edit of your document so that it doesn’t interrupt your thinking during the writing phase*.” Department for Education Writing Style Guide

An important part of writing is to understand the different style requirements that we have to address. In many organisations, there will be style guides or style manuals that are designed to guide the choices we can make about writing.

#### South Australian Government Writing Style Guide

The style guide on the sa.gov.au website contains guidance under the following headings:

|  |  |  |  |
| --- | --- | --- | --- |
| Abbreviations and Acronyms | Emphasis | Jargon | People and pronouns |
| Bullet Points | Government | Links | Punctuation and Spelling |
| Capitals | Images, diagrams, tables | Numbers and Measurement |  |
| Contact Details | Instructions | Page titles, labels, headings |  |

#### Department for Education Writing Style Guide

The Department for Education Writing Style Guide contains sections on:

* Key principles
* Our style
* Writing for or about:
	+ Aboriginal people
	+ people with a disability
	+ children and young people in care.
* Common words and phrases
* Quick tips
* Editing checklist

The guide includes detailed advice under the following headings:

|  |  |  |  |
| --- | --- | --- | --- |
| **Key principles** | **Our Style** |  |  |
| Tone | Abbreviations and acronyms | Gender-neutral content | Referencing |
| User-focused content | Alignment | Headings and structure | Sentence form |
| Spelling | Bias free | Job titles and positions | Single spacing |
| Plain language | Australian vs American English | Numbers | School terms and year level |
| Active voice | Bullet points and lists | Punctuation | Times and dates |
| Minimal capitalisation and punctuation | Capital letters | Positive voice | Underline or italics |
| Adaptability | Dashes and Hyphens | Quotation Marks | Upper case |

#### Australian Government Style Manual

A comprehensive style guide is this style manual published by the Australian Government. The style manual covers a variety of topics that are relevant to our writing.

It can be found online - [https://www.stylemanual.gov.au](https://www.stylemanual.gov.au/)

A screenshot from the website is shown over the page.



### Make and allow time to edit

The previous section covered materials relating to an author managing their time in the production of their document. It is a common time management failure to not allow enough time to edit the document.

The mid-point review referred to earlier can be used as one part of the substantive editing to assess the content and structure of the document.

We do not have to wait until the end of our writing process to edit. Editing can be a task we can use to provide a break from writing fresh content and help us overcome writer’s block.

If you are time poor, consider the possibility of delegating some editing to a colleague. This can also bring with it the benefit of ‘fresh eyes’ on our work.

### An eye or ear for detail

The starting point for copy editing is to ensure we use the features of Microsoft Word to do grammar and spellchecking which should automatically find spelling and grammar errors.

Another technique to consider for copy editing and proofreading is to read out loud – the ear can hear what the eye cannot see.

I recall a project to produce training materials for 16 training modules (approximately 500 pages of material) where the project sponsor used a read aloud editing method. Rather than submit drafts to him and his colleagues and have them all read them, mark them up and provide them back to me, hoping I would understand the changes, he recommended ‘reading meetings’. I would come to the meetings with printed draft copies of a module, and he would lead our reading of them by reading them out loud as an editing process. The reading revealed errors in spelling that had not been picked up in initial editing and highlighted examples of notes that did not sound right.

The process overcomes the problems that come from an author’s familiarity with their materials - “*The ears can hear what the eyes cannot see*.”

Reading aloud also helps us identify excessive word repetition and odd combinations of words.

## Summarisation

Our readers will demand succinctness from us. They are time-poor and will seek to understand the story of our initiative or the story of our finances as quickly as possible.

***“I didn't have time to write you a short letter, so I wrote you a long one.” Mark Twain***

Summarisation is a matter of method and choice.

It is my experience that succinctness is a function of methodology. I need to allow time to edit unnecessary words, to wordsmith and to summarise. When we summarise, we make judgements about the relative importance of the material we have prepared and then choose to elevate some material and relegate or delete other material. Summarisation is ultimately a choice of inclusion or exclusion within our work.

A report on a subject that is inherently complex, as is the case of a lot of Government policy, necessarily requires some length to present evidence and to explain how to manage the inherent complexities associated with the subject.

***“Perfection is achieved not when there is nothing more to add, but when there is nothing left to take away”* Antoine de Saint Exupery.**

In cases where there is inherent complexity, conciseness can be arrived at through:

* A straightforward narrative structure
* Using appendices to provide supporting evidence
* Creating an executive summary for a report.

I will prepare a draft report with my last task being to summarise that report by taking a chapter at a time and reducing it to four sentences that can then be organised into one or two paragraphs. The goal is a one-page executive summary that precedes the introduction section. For reports greater than 40 pages, I will consider summarising twice as per below:

|  |  |  |
| --- | --- | --- |
|  | **One page Exec Summary** | **Review summary** |
| Purpose | One or two paragraphs | Two thirds of a page |
| Recent History | One paragraph | Two thirds of a page |
| Analysis | One paragraph | Two thirds of a page |
| Insight | One or two paragraphs | Two thirds of a page |
| Strategy | One paragraph | Two thirds of a page |
| Execution | One sentence referring the reader to detail in the report | Two thirds of a page |

For a 25-page report, the one-page exec summary is likely to take me 2 to 3 hours to produce (20 minutes per chapter). For a longer report, I will allow half a day to a day to produce both of the above summaries.

The Review of the Office for Case Management report uses PRAISE as a narrative structure. As one of the final steps in preparing that report, I will work through each section of the report to summarise it into dot points and then sentences and paragraphs in order to produce an executive summary.

The Review of the Office for Case Management report uses PRAISE as a narrative structure. We can work through at least one section of the report to summarise it with a view to producing an executive summary for the report.

Please read the Purpose section of the review case study and write four short sentences that capture the most important points from the section.

1 -

2 -

3 -

4 -

# References

*Putting Stories to Work (2016)*, Shawn Callahan

*Style Manual*, Australian Government

*The War of Art* (2002), Stephen Pressfield

*Do the Work* (2011), Stephen Pressfield

*Several short sentences about writing* (2012), Verlyn Klinkenborg

*Draft No 4* (2017) John McPhee

*On Writing Well* (2006) William Zinsser

*The Sense of Style* (2015), Stephen Pinker

*How to Write Proposals and Reports that Get Results* (2003) Ros Jay

# Appendix 1:  Present gaps to reveal/discover

The scatterplot below is of space shuttle launches before the launch of the Discovery in January 1986. The launch proceeded despite concerns about the performance of O-rings on the fuel tank in cold weather. There was evidence the performance deteriorated with colder temperatures. The data from previous launches show that the risks associated with O-rings increase as temperature decreases. Prior to the Challenger, the coolest temperature for a launch with no O-ring damage was 66 F. On the day of the launch of the Challenger, the temperature was 37F.



While not all of us are involved in the presentation of data in such dramatic circumstances, there are many circumstances when the presentation of data has a significant impact on decisions being made across the public sector.

To support decision-making with the graph above, consider adding a couple of elements that highlight factors critical to the decision by revealing gaps with:

* A line of best fit on the data
* A reference point or benchmark for the decision to be made
* Highlight the gap between the data and the reference point.



A business case or funding request will usually be based on there being a gap between an ideal or target performance and current or real performance. For example, a business case for more building capacity can be based on revealing a gap in the target (or benchmark) waiting list and the current or project waiting list. Discovery of such a gap can occur by:

1. Presenting the ideal state – the benchmark or target.
2. Presenting the most recent trend against the benchmark to show any gap between recent performance and the target.
3. Presenting the projected trend based on current assumptions to reinforce the gap between performance and the target.
4. Presenting findings regarding the gap along with evidence of building capacity as the main reason for the gap
5. Presenting data to show the number of rooms required to close the gap.

Examples of graphs that do this are shown below

There is trend growth in the backlog of cases. There has been trend growth in the backlog of cases as shown in the graph below.



Projected growth in the waiting list compared to the benchmark is presented in the graph below.



Modelling has been done of the growth in cases and the growth in the number of facilities (e.g. operating theatres, beds, rooms, offices) required. This modelling has estimated that to increase the number of cases processed to eliminate the waiting list gap from the benchmark, three additional facilities are required, along with extra staff to operate and process cases in these facilities.



# Appendix 2: Degrees of separation and readability

An important element of understanding your audience is to understand how many degrees of separation there are between you and them as it relates to the subject matter or policy that you are writing about.

A degree of separation is the distance in knowledge between you as the author and the intended audience of your report.

* One degree of separation occurs when you as the author are reporting to someone in your team or your field of expertise. You have shared knowledge, expertise and appreciation of language specific to your field (i.e. jargon).
* Two degrees of separation will occur when you are writing for an audience that is outside your team but still within your organisation. An example of this is when you are writing for your boss’s boss or when you are writing for another team within your organisation (e.g. ICT communicating with finance).
* A third degree of separation occurs when you write to someone outside your organisation but within your broader industry. In the case of a government, the third degree of separation can occur if a document must meet the requirements of a central agency like Treasury and Finance or Premier and Cabinet.
* A fourth degree of separation can occur when your intended audience is outside your industry sector. In the case of government, the fourth degree of separation may occur when the intended audience is a new minister or the public who cannot be presumed to have a deep understanding of the technicalities of your area or subject matter.

For each degree of separation, the readability of your report needs to be adjusted to accommodate what is reasonable to expect for each of the different audiences.

*Readability is the ease with which a reader can understand a written text. In natural language, the readability of text depends on its content (the complexity of its vocabulary and syntax) and its presentation (such as typographic aspects like font size, line height, and line length).* Source: Wikipedia

The graphic below links the readability of our report with the degrees of separation.

Degree of separation

Document readability

Middle Primary

Tertiary

One

Four

Three

Two

Lower secondary

Upper secondary

Microsoft Word (use options (or preferences)/proofing to enable readability statistics) and websites like readabilityformulas.com can evaluate the readability of a piece of text for you. The readability is assessed based on algorithms that assess things like word length, syllable number and sentence length.

If you work in a policy area that requires a tertiary qualification to be part of your team then one degree of separation from you means you can pitch that document at a level that is reasonably interpreted by somebody with tertiary qualifications. For example, if the audience for your report is your boss and if you and your boss are higher degree qualified and you both understand terminology jargon and language you can pitch the report at a tertiary or higher degree level.

For the second degree of separation, the readability of your document needs to be adjusted to pitch it to the upper high school level. This is not disrespectful to your reader. Indeed, it is quite the opposite. It is respectful of the fact that your reader is not as familiar with the subject as you are. Care also needs to be taken in the use of jargon. Jargon can be used as a means of excluding people from your information. People who read reports with lots of jargon will interpret the use of the jargon as a means by which to exclude them.

A third degree of separation might see the document adjusted to a lower secondary level. A fourth degree of separation would see the document adjusted to an upper primary school or middle primary school readability.

### Example of Statistics from MSWord from the response earlier


*Readability Statistics for our response*

*“Registers are the styles of language we adopt in particular situations.”* (Style Manual p51)

**A formal** register is used in public ceremony while an informal register is used when using language with friends and family.

A formal register is more likely the greater the distance or separation from the reader. Formal register is also consistent with the respect required for positions of authority. Formal register tends to use longer words.

An example used in the style manual:

*“In discussions yesterday, the Federal Cabinet focused on the formulation of amendments to workers’ compensation legislation.”*

**A neutral or standard** register is used when there is no presumption about the readers. Tends to use a mixture of everyday and formal language.

Example used in the style manual:

 *“Cabinet Ministers yesterday discussed how to word changes to the laws on workers’ compensation.”*

**Informal** Register is used when we are communicating with people who we are familiar with and who are familiar with the subject matter. Uses colloquialisms and jargon that may confuse those not familiar with the subject

Example used in the style manual:

*“Yesterday, Canberra pollies worked on the new workers comp laws.”*

# Appendix 3: Executive summary

**PURPOSE**

The State Government has made clear public statements demonstrating its commitment to better protect the most vulnerable members of our community and break the cycle of disadvantage. Legislation has created the Office for Case Management (the Office) that plays an independent and leadership role in meeting the Government’s policy commitment.

The services delivered by the Office are of high public value. We value that each member of our society will be protected and supported when confronted with difficulties and dealing with disadvantage that could occur to any of us at any time and at no fault of our own. The importance and value of the Office is reinforced by stakeholders. In addition to the case management services provided, they value the independence of the Office and the advocacy it offers on behalf of vulnerable persons.

The Office was created in 1983 with 6 FTEs and grew to 9.5 FTEs in 1995 following a restructure. A successful budget bid in 2006 increased the staffing to 10.5 FTEs. The funding model for the Office allows for inflation growth but does not allow for changes in activity. In the last four years, demands for all services: case management (12% per annum), investigations (17 % per annum), enquiries and outreach have grown rapidly.

**ANALYSIS**

**RECENT**

**HISTORY**

Analysis has been performed of the workload and the way work is done in the Office and has concluded that workloads are growing rapidly and that the Office has taken steps to improve its efficiency and effectiveness. Benchmarking analysis has shown that when compared to interstate offices, workloads in South Australia are excessive. Other legislative requirements of the Office have been set aside to enable it to deal with the demands of increasing case-loads.

**INSIGHT**

The functions of the Office specified in the legislation are not being performed to the extent required with flow-on impacts associated with failures to exercise a duty of care and failures to comply with legislative requirements. This is a risky situation for the Office and for the Government. The stresses within the system present real and present risks of public failures to meet legal obligations and exercise duties of care that are likely to trigger litigation.

The root causes are the growth in demand, which is outside the control of the government, and a deficient funding model that is within the control of the government. A funding model and budget process that ignores growth in caseloads and that requires the Office to repeatedly bid and negotiate additional funds is at odds with the independence of the role. It is also at odds with the legally binding nature of the cases being managed and appears to ignore the duty of care implications of resource shortfalls.

**STRATEGY**

Addressing these shortcomings requires a revised approach to the structure, resource base and funding model of the Office. A revised structure for the Office consisting of 18.5 FTEs is recommended along with a supporting resource plan. This structure and resource plan have been recommended based on a been recommended based on a reasonable caseload and based on the reinstatement of positions required for education, and community programs that were part of the original structure of the Office. It is recommended that the funding model for the Office be changed so that the Office receives a level of funding linked to demand for its services as a case manager without compromising its duty of care or compromising the standard of its services.

**EXECUTION**

Details on the steps recommended to implement this strategy are contained in section seven of this report