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PUNTLAND STATE OF SOMALIA  
Ministry of Interior Affairs, Local Government & Rural Development

# Office Management & Administration for Local Governments

## ***MODULE 1.***

## ***WRITTEN***

## ***COMMUNICATION***



# **PARTICIPANT BOOK (DRAFT)**

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**May 2016**



SUPPORT PROVIDED BY UNITED NATIONS

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# Introduction

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## Aims, Objectives and Timing

This set of Office Management & Administration training modules is designed to provide district staff with supporting skills development to complement the training in the HRM modules 1–5, as well as the everyday work practices of the district administration. It should be noted that these topics are designed to be delivered as ‘standalone’ training topics, and do not have to be delivered in sequence or at the same time. The topics are listed below along with estimated timings for each.

## Overview of Office Management & Administration Training Modules

| Module   | Timing         |
|--|----------------|
| <b>Module 1: Written Communication</b>                   | <b>6 hours</b> |
| Module 2: Effective Meetings                             | 6 hours        |
| Module 3: Organising the Office                          | 6 hours        |
| Module 4: Managing Office Assets, Travel and Procurement | 6 hours        |

## Introductory Session

## Getting Started

*Session Objectives:*

- Create a comfortable and encouraging learning environment.
- Provide an overview of the training, including aims and objectives.
- Understand participants' expectations of the training.
- Set some agreed ground rules for the training.

! In this session you will get to know your trainer/s and the other participants. You will find out what the training involves and what you are expected to do.

Here are some topics your trainer is likely to cover in this session:

- Welcome, Introductions and 'Housekeeping'
- Aims and Objectives of the Training
- Expectations and Ground Rules
- Pre-Assessment Task
- Action Plan

**'Icebreaker' Questions:**

Discuss the following quote:

*We have two ears and one mouth so that we can listen twice as much as we speak.*

What does this quote mean? What is your reaction to it?

**Action Plan**

- **What is an Action Plan?** An action plan is simply a way of putting down in writing what action you and your colleagues plan to take to achieve certain outcomes. Action plans can help clarify and commit us to **what** needs to be done, **who** is going to do it, by **when**, and what **support** might be needed.
- At the end of this module, you will be asked to make an entry in your action plan, of something that you can implement when you are back in your workplace, as a result of what you learn in this training. There is an action plan template at the end of this Participant Book.

## Session 1

## Letters, Memos, Circulars, and Emails

### *Learning Objectives*

By the end of this topic participants will be able to:

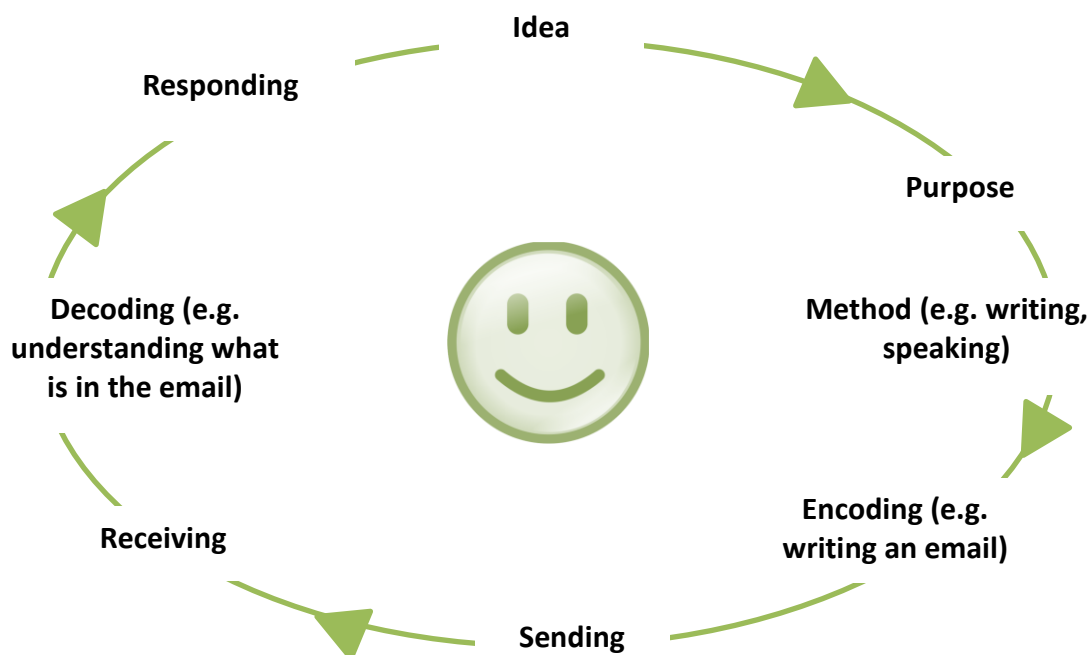
- Clearly distinguish between an internal memo and external letter.
- Write a clear and concise memo, letter or email.
- Explain the appropriate lines of internal and external communication within the district administration.

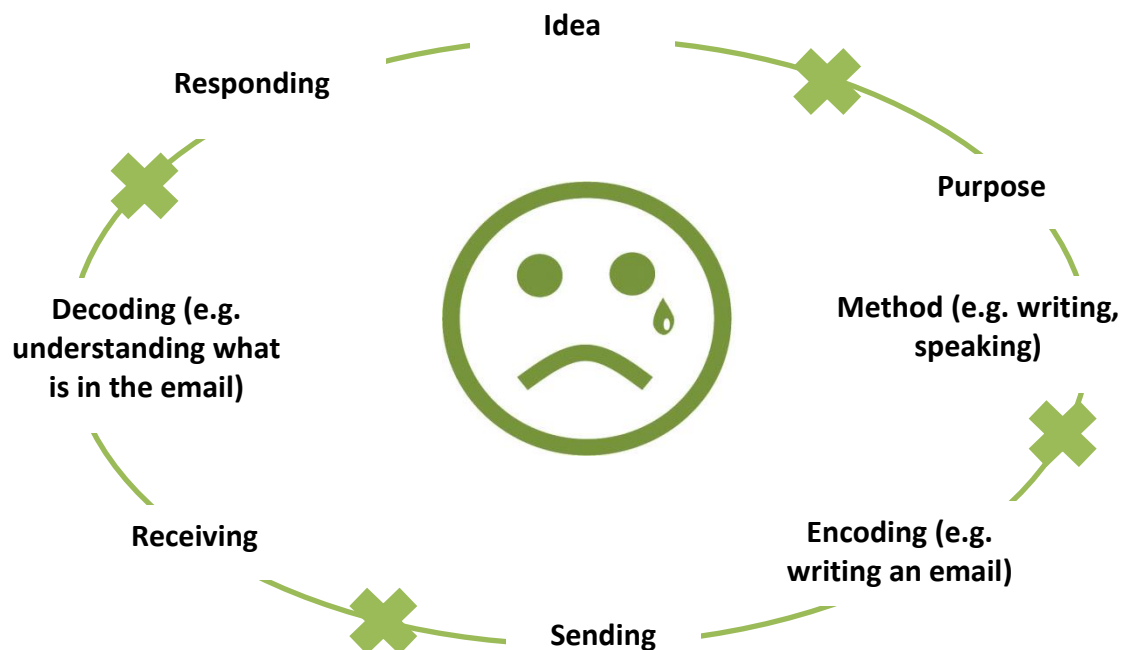


### *Questions for Discussion*

- What forms of *written* communication are you expected to prepare as part of your work role? Give specific examples.
- Think of an 'idea' that could be the starting point of the communication cycle below. Your trainer will lead you through an example to illustrate the cycle.
- In your experience, what sorts of things can cause the communication cycle to break down. and how can this be avoided?

**Diagram 1: The communication cycle**



**Diagram 2: The communication cycle—breakdown**

### *Key points: The communication cycle*

Writing is a means of communicating. For good communication, there must be:

- an *idea*
- a *purpose*—or a reason for wanting to pass the idea on to someone.
- the *encoding*, or writing the message which explains the idea.
- the *sending* of the message

The receiver of the message must do the following:

- *receive* the message
- *decode* the message—that is, understand what has been written.
- *respond* to the message—for example, take action, or make a decision about something.

The communication cycle can sometimes break down. In order to avoid this:

- Stick to one *idea* or topic whenever possible. If you must write about more than one topic in the same piece of correspondence, label these clearly (e.g. numbering topics).
- Keep your *purpose* in mind while writing—be clear about whether you are writing to inform, or to get information.
- Make sure that you and the reader will understand the importance and relevance of the correspondence, for example, consider the audience who will read the correspondence; use language that is appropriate for the audience, the purpose and the type of correspondence; and package your correspondence professionally.

Source: The above diagrams and information has been adapted from 'Effective Writing—plain English at work', E.M. Murphy, (2014).



## Questions for Discussion

Each district department has a number of functions that it is required to fulfil, many of which require written communication. Below is an example of some of these functions.

- Which of the following functions require **written communication**? Give examples of the different types of written communication that are needed in order to fulfil these functions.

### *Some Functions of the District Departments*

#### **Administration and Finance Department**

- To ensure, prepare, store and execute the budget of the district local government.
- To store and oversee tender/contract documents, which the district local government is a party to.

#### **Social Affairs Department**

- To oversee the suitability/usage of medicine and canned food items and their expiry dates.
- Prepare the table of shifts of the pharmacies and health centres.

#### **Revenue Department**

- To recommend about creation and reorganisation of taxes.
- To evaluate different types of taxes every year.

#### **Public Works and Land Department**

- To submit lists of new vehicles needed.
- To prepare and submit daily plans on fuel, oil and grease needed for the vehicles, motors and heavy duty machines of the Council.

#### **Planning Department**

- To establish and maintain relevant data collection and data management systems
- To coordinate the development and updating of the District Development Framework (DDF).

## Internal and External Communication

The **Human Resource Management Manual for Local Governments** outlines some internal communication processes that should be followed within the district office as outlined below:

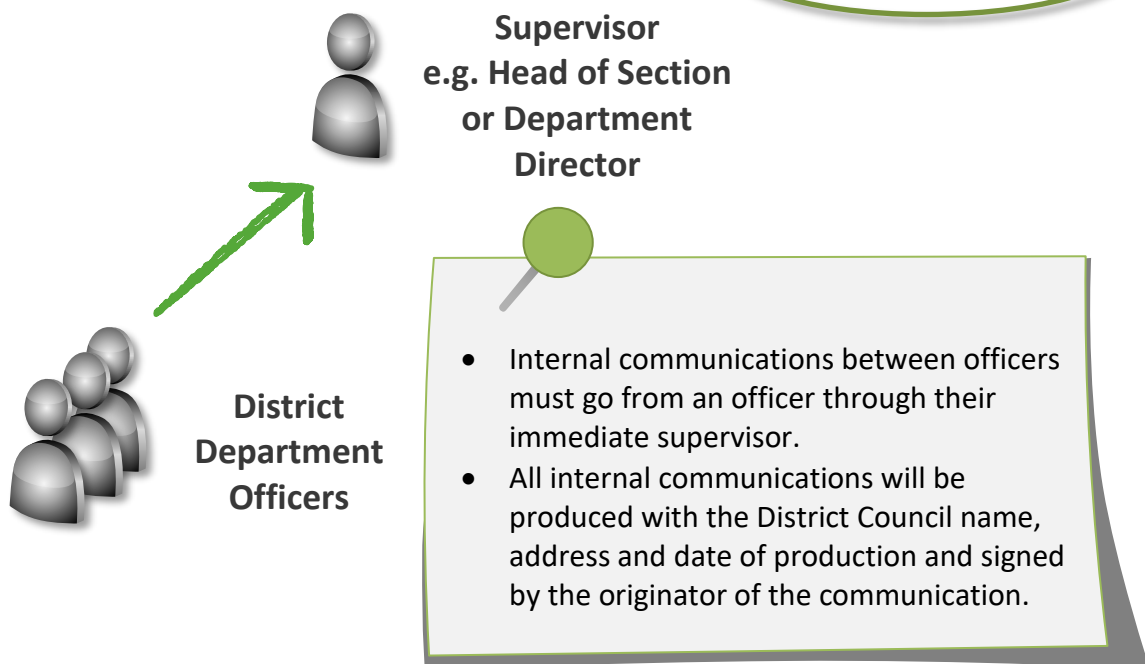
### 5.28 Internal Communication

Internal communication will generally comprise **letters and memoranda (memos)**. As a general rule, internal written communication is done through memos and external communication by letter.

Internal communications between officers must go from an officer to their immediate superior. If the communication is addressed to an officer other than their immediate superior, it must go through the immediate superior who must make any relevant notes on the document and must forward it to the addressee **within three days**. Supervisors cannot withhold communications from being forwarded; to do so will result in disciplinary procedures.

All internal communications will be produced with the District Council name, address and date of production and signed by the originator of the communication.

Diagram 3: Internal Communication



The **Human Resource Management Manual for Local Governments** outlines some external communication processes that should be followed within the district office as outlined below:

### **5.29 External Communication**

The Mayor, Executive Secretary and Departmental directors will generally be responsible for external communication. Any legally binding communication shall be the responsibility of either the Mayor, Deputy Mayor or the Executive Secretary, as decided by the Executive Committee.

Members of the Permanent Committee may initiate and sign external communications relevant to their responsibilities if approved by the Executive Committee. However, in some instances, a senior member of staff may be delegated to make such communication. In this case the appropriate annotation should be made on the relevant file by the delegating officer.

All letters going outside the District Council shall be signed by the Mayor, Vice-Mayor or Executive Secretary or his/her delegated officers. The relevant senior Council staff (i.e. Mayor, Vice-Mayor or Executive Secretary) shall be fully accountable for the contents of such letters. The Mayor or the Executive Secretary shall sign all contracts or agreements on behalf of District Council, or delegate this responsibility in writing to another senior officer as required.

### **5.31 Incoming mail**

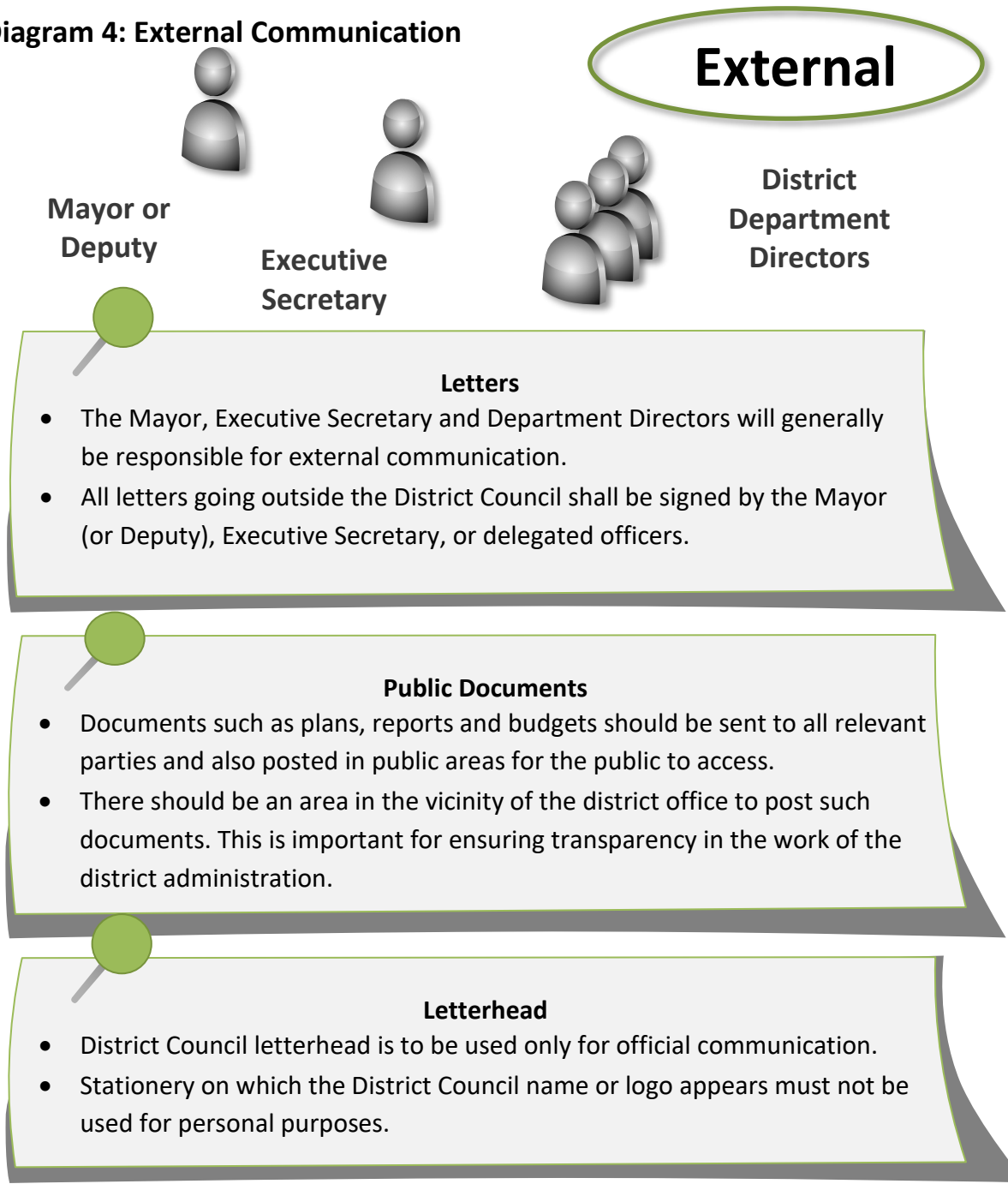
All incoming mail will be delivered to the Registry Clerk in the Executive Secretary's office, where it will be registered in the Incoming Mail Register. The Registry Clerk will record the mail and also the officer that it was allocated to, and ensure that the mail is promptly delivered to the correct officer by 10 am at the latest each day.

### **5.32 Outgoing mail**

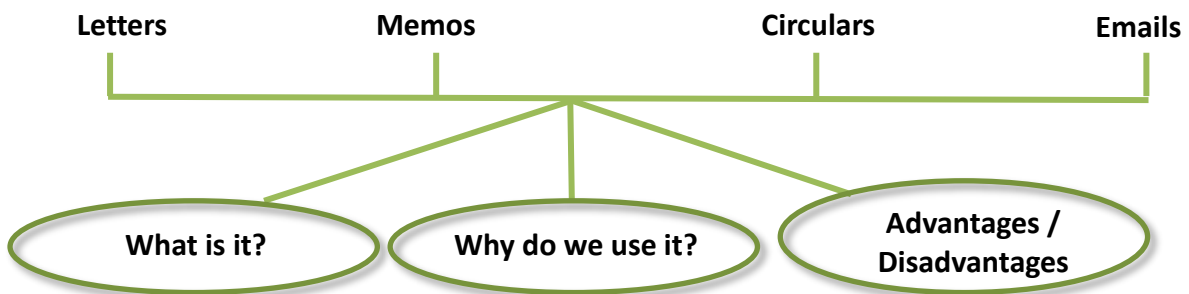
Official mail should be produced so that: (1) an original copy is held in the filing system of the personal computer used to produce it; (2) a signed hard copy is retained in the appropriate hard file; and the signed original is dispatched to the addressee or delivered or collected. If correspondence is collected from the District Council office, the addressee should sign and date the file copy to verify that the letter has been received.

Before dispatch, the out-going mail will be recorded in the Outgoing Mail Register, showing the addressee the date and the nature of delivery— messenger, Dahabshill postal box, collection etc.

**Diagram 4: External Communication**



**Diagram 5: Overview of Written Communication**



**Table 1: Overview of Written Communication—Letters, Memos, Emails, and Circulars**

| <b>What is it?</b>   | <b>Why do we use it?</b>   | <b>Advantages/Disadvantages</b>  |
|--|--|--|
| <p><i>Letter</i></p> <p>Usually a formal means of communication, to inform or notify the recipient about something, or make a request for something.</p>         | <p>For communicating something formally or officially.</p>   | <p>A signed, formal letter is likely to be taken seriously, due to its official nature.</p> <p>It can be a long process to draft, check, sign, and send a formal letter.</p>                 |
| <p><i>Memos</i></p> <p>Similar to a letter, but used for internal communication and can be less formal than a letter.</p>  | <p>Memos can be used for the following reasons:</p> <ul style="list-style-type: none"> <li>• Announcements</li> <li>• Confirmation/Record of conversation</li> <li>• Request for action</li> <li>• Instructions/Procedures</li> </ul>      | <p>Memos can be quicker to write, send, read and respond to.</p> <p>Because memos are quicker to write than letters, there can be a tendency to send them without proper checking first.</p> |
| <p><i>Circulars</i></p> <p>A circular letter is a document or letter that is sent to a closed group of people with the intention of being widely circulated.</p> | <p>Circular letters are used to inform the recipients of new policies or other important matters. For example, they might be sent to all of an organisation's employees or clients to notify them of new plans or a change of address.</p> | <p>A good way of circulating important information to a wide group of people at the same time.</p> <p>Not tailored to a specific recipient, so the information must be kept general.</p>     |
| <p><i>Emails</i></p> <p>An electronic means of written communication.</p>  | <p>Can be very useful for communicating with people in another location.</p> <p>Can be very useful for asking questions and sending information in a short time.</p>   | <p>Messages can be sent and received very quickly.</p> <p>Too many emails being sent and received can be time-consuming and not enough attention is paid to the important ones.</p>          |

**Table 2: Letters and Memos—some different characteristics**

| Characteristic                                  | Letters                   | Memos                   |
|---|---------------------------|-------------------------|
| <i>Audience</i>                                 | External                  | Internal                |
| <i>Style</i>                                    | More formal               | Less formal             |
| <i>Length</i>                                   | Tend to be longer         | Tend to be shorter      |
| <i>Approach</i>                                 | Can be direct or indirect | Usually direct          |
| <i>Provides information or requests action?</i> | Usually both              | Usually requests action |
| <i>Use of 'in-house jargon'</i>                 | Not suitable              | Can be used             |
| <i>Likely to enclose other documents?</i>       | Yes                       | Not often               |
| <i>Copies sent to others?</i>                   | Sometimes                 | Fairly often            |

**Table 3: Letters and Memos—some differences in formatting**

| Format  | Letters    | Memos  |
|---|------------|--|
| <i>Full name, title, address of reader given?</i> | Yes        | Not often  |
| <i>Subject identification line?</i>               | Yes        | Yes  |
| <i>Salutation/Greeting</i>                        | Yes        | Not normally   |
| <i>Writer's name—position in document</i>         | At the end | At the beginning   |
| <i>Formal closing</i>                             | Yes        | Not usually  |
| <i>Writer's signature</i>                         | Yes        | Yes  |
| <i>Sealed in an envelope?</i>                     | Yes        | Sometimes—can also be circulated electronically or posted in a public place. |
| <i>Copies sent to others? (CC)</i>                | Sometimes  | Fairly often   |

Source: Above tables and information adapted from 'Writing at Work', B. Eunson (1996), John Wiley & Sons, Australia.

## Key Points: Letters

**Table 4: Writing a letter**

| Section  | Details to include  |
|--|---|
| <p><b>1. The Start</b><br/> <i>This includes important details such as address, date, name/title of recipient and subject heading.</i></p>   | <p><b>Address of the writer</b><br/>           This usually goes in the top right hand corner of the letter and includes all details.</p> <p><b>Address of the recipient</b><br/>           This usually goes in the top left hand side of the letter and includes all details.</p> <p><b>Date</b><br/>           This goes under the address. Write in full, for example, 2 March 2016 or March 2, 2016. Try to avoid using numbers, for example, 2/3/2016, as there can be confusion between the British and American way of writing dates.</p> <p><b>Name/Title of recipient</b><br/>           Dear Sir or Madam/Dear Director/To whom it may concern<br/>           This is used in a formal letter or if you don't know the name of the person you are writing to.</p> <p><b>Subject Line</b><br/>           Formal letters often include a subject line, which states the subject of the letter. For example:<br/> <b>Re: Update on District Annual Work Plan implementation</b></p> |
| <p><b>2. Opening Section</b><br/> <i>You need to explain why you are writing. Sometimes you need to refer to previous communication.</i></p> | <p>The purpose of the opening section is to:</p> <ul style="list-style-type: none"> <li>• announce the topic of the letter</li> <li>• give a reason for writing</li> <li>• set the scene—put the letter into context and explain the background.</li> </ul> <p><i>For example:</i></p> <p>I am writing to inform you about....</p> <p>I am writing to confirm our meeting...</p> <p>I am writing regarding our meeting next week...</p>   |

I refer to our conversation last week...

I refer to your email of 12 March 2016... (if replying)

As you may be aware, the Ministry of Health is conducting a workshop on 15 and 16 April 2016...

**3. The Main Body**  
*Usually in the main body of the letter you will give more detail about your reason for writing.*

Only write as many paragraphs as you need to get your message across economically. This section of the letter should:

- explain the purpose, using logically organised paragraphs
- include evidence to back up statements, and/or give reasons for requests, if needed.

Some examples:

*Making a request*

Could you kindly provide me with updated information about your project?

*Accepting an invitation or offer*

I am pleased to accept the invitation to speak at your workshop next week.

*Giving bad news*

I regret to inform you that your job application was unsuccessful.

*Enclosing/Attaching documents*

I am enclosing a report for your information.

**4. Conclusion**  
*Usually a letter is finished with a courteous comment and often a reference to future contact.*

The conclusion can do one or more of the following:

- sum up what has been said in the letter so far
- emphasise the main point you want the reader to remember
- say what action you want the reader to take.

You should only need one paragraph to make your point and then finish on a pleasant note.

Some examples:

Please do not hesitate to contact me if you require any more information.

I look forward to hearing from you.

Yours faithfully/Yours sincerely...

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5. CC (if required)

Steps for including 'CC' (Courtesy Copy) in a letter

1. *Write the letter*

Complete the entire letter first, from return address to signature and enclosure notation, if applicable. This ensures proper placement of the courtesy copy information.

2. *Place the initials*

Double space after the end of the letter. Left justify "cc," and follow it with a colon. Insert a space after the colon.

3. *Identify the recipients*

On the same line as "cc:," list the name of the person who is receiving the courtesy copy. There should be one space between the colon and the name. If more than one person is receiving the cc, put each name on a separate line in alphabetical order, making sure subsequent names are lined up with the first name.

Source: Above information adapted from 'Writing at Work', B. Eunson (1996), John Wiley & Sons, Australia, and 'Effective Writing—plain English at work', E.M. Murphy, (2014).

## Example 1: Formal Letter

Somaliland Friends INGO  
24 Market St  
Hargeisa, Somaliland

Mohamed A.  
Mayor, Barako District  
33 Main Street, Barakotown  
Barako District, Somaliland

Thursday 2 June 2016

Dear Sir,

Somaliland Friends INGO has been operating in Somaliland since 2008. During that time, our INGO has implemented many successful projects in different parts of Somaliland. Examples include construction of primary schools and maternal health centres, as well as working with local communities to raise awareness on the importance of education for children, especially girls.

Somaliland Friends INGO would like to commence some project work in Barako District in 2017, and believes that the first step is to liaise with you as Mayor of the District, to determine where our inputs can be most useful, and to ensure that any projects we propose will fit within your District's planning and prioritisation for the coming year.

As such, I respectfully request a meeting with you at your earliest convenience, in order to discuss your District's priorities and identify where our inputs can be of most benefit to Barako District. I am available to travel to Barako District to meet with you as required.

I look forward to your response.

Yours sincerely,

*J. Do-Good*

Mr John Do-Good  
Director, Somaliland Friends INGO

Contact us:  
[director@somalilandfriendsingo.com](mailto:director@somalilandfriendsingo.com)  
[www.somalilandfriendsingo.com](http://www.somalilandfriendsingo.com)

## Key Points: Memos



Memos tend to be less formal in style, given that they are for an internal audience. They are also shorter than letters because:

- The conventions of memo writing allow the writer to dispense with some of the formalities of letter writing and use more succinct language.
- The memo writer and reader share a common background of understanding because they are part of the same organisation. Thus there is less background explanation required.
- Memo readers can seek clarification from the writer more readily, for example, through a phone call or face-to-face discussion, given that they are in the same office environment.

### *Sending a Memo*

Official internal memos should be signed by the person who drafts them and circulated to the intended recipient, as well as the Director of the Department from where the memo came.

### *Checklist for sending a memo (official internal)*

1. If the memo is drafted on behalf of another person, get their approval on the draft before finalising it.
2. Check spelling and grammar.
3. Make sure the memo is signed by the person who drafted it.
4. Circulate to intended recipient.
5. Circulate to the Director of the Department from where the memo came.

### *Receiving a Memo*

When receiving an official internal memo, there are certain steps that should be followed, in order to ensure it is actioned correctly. See **Diagram 6** below.



## *Important!*

An **internal memorandum** should include:

- the main topic of discussion
- a brief summary (background information, etc.)
- may include graphics –but limited
- explain what information you are looking for and why
- conclusion, i.e. asking for a task to be completed
- if appropriate, reference any attachments
- sign and date the memorandum with your name and position title

## Types of Memos

### *Announcements*

These are usually for a wide audience, and can be circulated on paper or by email, or posted on a noticeboard. They include information only—no action is expected of the reader, for example, the announcement of a new Department Director.

### *Confirmation*

This type of memo acts as a written record of a phone or face-to-face conversation. It ensures that the reader and writer both agree on what was discussed and what action is to be taken. Such a memo would include details such as dates, places, roles, responsibilities and outcomes. This type of memo can also be sent as an email.

### *Request*

- The writer makes a request and expects the reader to take action and communicate back about what action has been taken.
- For example, a supervisor asks a staff member to set up a meeting between the supervisor and two external parties. The memo would give details about who the people are and what the purpose of the meeting would be. The staff member would be expected to act on this memo – to arrange the requested meeting and report back to the supervisor when some details about the meeting (such as time, date etc) have been confirmed.
- This is the kind of request that could also be communicated by email.

### *Instructions/Procedures*

This type of memo is a short, simple way of communicating to others how something should be done. Often these memos are general, or sent to a number of people and may also be publicly displayed. For example, instructions from the Human Resource Department to staff on the proper process for requesting leave.

Source: Above information adapted from 'Writing at Work', B. Eunson (1996), John Wiley & Sons, Australia.

## Example 2: Internal Memo

**BARAKO DISTRICT COUNCIL  
INTERNAL MEMORANDUM**

TO: HR Officer  
FROM: A. Hassan, Director, Public Works  
DATE: 21 January 2016  
SUBJECT: Short Course for Public Works Department Staff

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In accordance with District Council Staff Training Programme for 2016, three staff of the Public Works Department have been funded to do short courses.

I am now requesting that you approve the release of funds from the Staff Training Programme budget to pay for this training and to advise the Finance Officer, Finance and Administration Department to approve this expenditure so the course fees can be paid. I have attached the invoice for the course from the University of Berbera.

Please advise me in writing of your approval so that enrolment of the Public Works Department staff can be completed and they can attend the course.

**A. Hassan**  
Director, Public Works

1. Brief summary of the topic—one paragraph. You must mention any authority to do what you want to do.

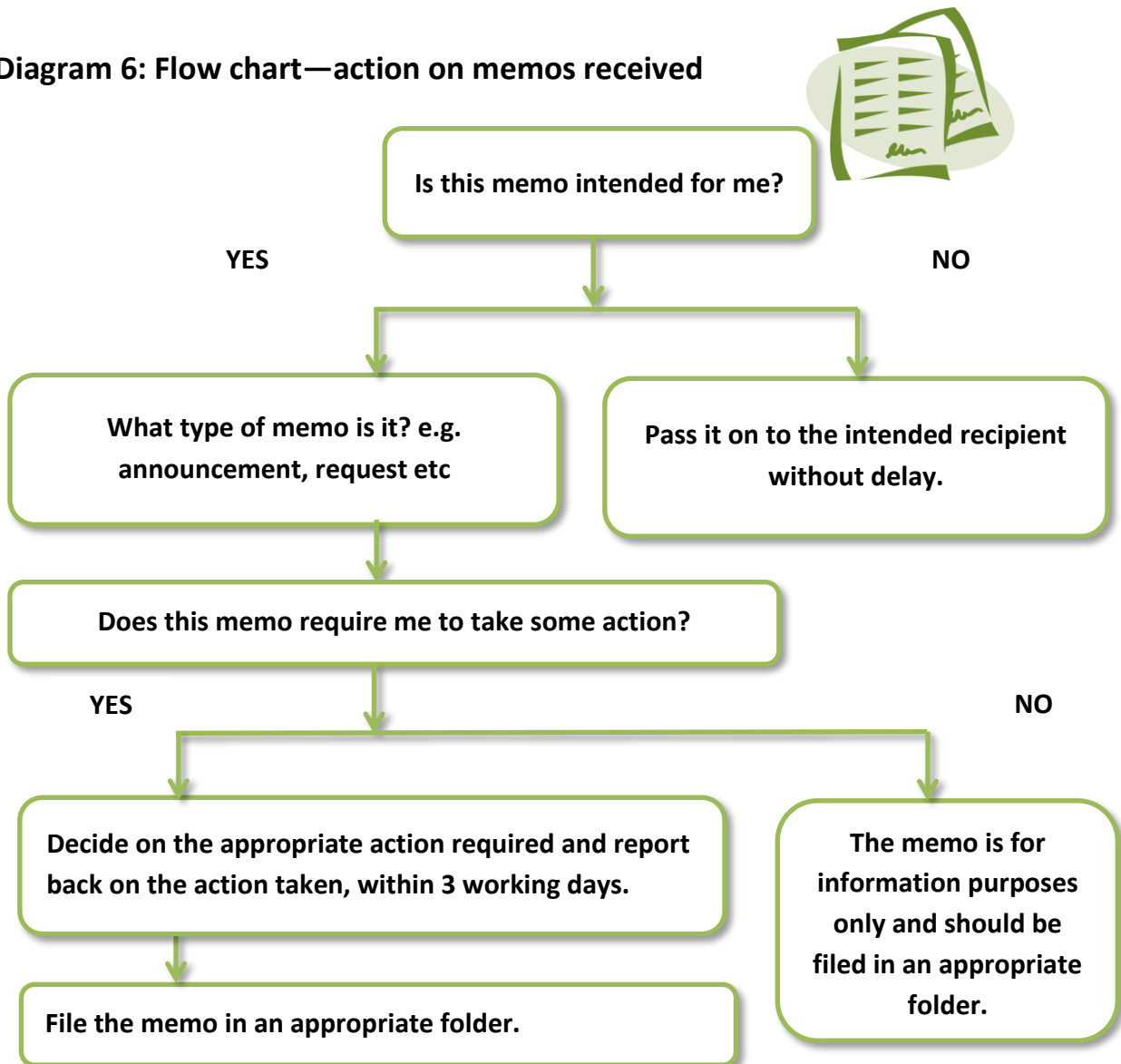
2. Explain what you want the person to do and why.

3. Conclusion, asking for a task to be completed. If appropriate, reference any attachments, and attach them to the memo.



### Questions for Discussion

- Have a look at the memo in Example 2 above. What type of memo is it— instructions, request, announcement or confirmation?
- What action should the HR Officer take and how should the HR Officer respond? (see Diagram 6 below)

**Diagram 6: Flow chart—action on memos received*****Scenario: What would you do?***

You are a district department officer and have received a memo which is actually intended for your supervisor (a department director). However, after reading the memo, you realise it contains some confidential information, in particular, details of your supervisor's recent unsatisfactory performance assessment. Your supervisor calls you to his office and asks you if you have seen a memo that was intended for him, as it seems to have been misplaced. How do you respond?

*Discuss the above scenario and identify what might happen next....is the officer honest with the supervisor? Or does he/she pretend to know nothing about the memo?*

**Questions:**

- What are the possible consequences of not telling the truth when asked?
- What might happen to the officer if he/she is honest?

## Key Points: Circular letters

A circular letter is used to share the same information with a large audience. It differs in purpose from a personal letter, which sends particular information to one or a few recipients. Circular letters are often used to announce new information or to clarify policies. They are somewhat general in topic, since they are widely read. Writing a circular letter of any kind requires a few important steps.

- Know your audience. For circular letters, readership is diverse, so it can be difficult to gauge your audience's level of prior knowledge or familiarity with the content that you want to share. However, consider the majority of likely readers when you write, so that your letter is useful to the most people.
- Distinguish between internal and external circular letters. An internal circular letter, although circulated to a large group, is still restricted to a group. For instance, a business may circulate an internal letter to employees about a new company policy. In contrast, an external letter would be a letter circulated to all clients or to the public.
- Use the tone and voice appropriate for the kind of communication (internal or external) for which the circular letter will function. For instance, a stern tone would be appropriate for a circular letter to all employees addressing tardiness or absenteeism. However, a stern tone would not be appropriate to use for a letter to circulate to business clients, or members of the public.
- Share only authorised information. Since circular letters are intended for a large audience, they are not suited to disclose confidential information or details not intended for a widespread audience.

Source: *How to write any type of circular letter*, eHow, [www.ehow.com/how\\_8545982\\_write-type-circular-letter.html](http://www.ehow.com/how_8545982_write-type-circular-letter.html)

### Example 3: Circular

Jamhuriyadda Somaliland  
Dawladda Hoose ee Barako

Xafiiska Gudoomiyaha Deegaanka

REF/DHD/BAR/34/04/2016

April-17-2016

Ku: Xoghayaha Fulinta D-Hoose Degmada

Ku: Agaasimeyaasha Waaxyaha D-Hoose Degmada

Ujeedo: Siyaasadd Cusub oo Tababarada Gudaha iyo Debedaba oo khuseeya Shaqaalaha O-Hoose

1. Waa in waraqada Codsiga ah ee lagu dalbanaayo Shaqaalaha la keeno Xafiiska Shaqaalaha si loogu File Gareeyo Xafiiskaa.
2. Waa in cidkasta oo loo diyaariyo tababar ama training loo Gudbiyo liiskooda Xafiiska Shaqalaaha D-Hoose
3. Waa in Shaqaalaha loo diray Training ay soo diyaariyaan warbixin kooban oo ku saabsan nooca uu yahay Training ay soo qaateen iyo wuxuu khuseeyey.
4. Waa in Shaqaalaha Training-ka soo qaatay ay soo diyaariyaan Qorshe hawleed-kooda ay ugu talo galeen Tababarka ay soo qaateen.
5. Waa in qofkasta oo shaqaale ah uu uga Faa'ideeyo Training-ka uu soo qaato shaqaalaha kale si looga wada faa'idaysto.
6. Waa in Cidkasta oo kaqayb qaadata Training lala Xisaabtamo marka uu soo dhamaysto.
7. Waxaa loobaahan yahay in qof kasta Training-ka uu qaato uu sifiican u darso

Alla Mahad Leh

  
**DHBA**  
Mohamed A.  
Gudoomiyaha, Degmada Barako

Contact: Barako District  
[Best\\_Mayor\\_Barako\\_91@gmail.com](mailto:Best_Mayor_Barako_91@gmail.com)

## Key Points: Writing Emails

- Emails have taken over from printed letters in many ways. They are easy to send, cost very little and reach the recipient almost instantly.
- Although emails are less formal than letters, they should follow the same conventions of polite, respectful language.
- People generally read emails on screen, so keep them short to avoid scrolling.
- Make the subject line meaningful to the reader, and relevant to the folder it will be stored in. A clear subject line about the purpose of the email will help the recipient decide whether to read your email. If the subject line is missing, incomplete, vague or too long, the message may be deleted without being read.
- Your signature block at the bottom of the email should identify you, your position and contact details.

### *Using 'cc' and 'bcc' in emails*

- CC is the email abbreviation for courtesy copy and BCC stands for blind courtesy copy.
- It can be difficult to know who to 'CC' and 'BCC'. A good rule of thumb is to use 'To', for people who are required to take action. 'CC' lists those you want to keep informed but need take no action. For 'BCC', include those you want to receive the message without any of the other recipients knowing.
- CC is a good way to send your message to the main recipient, while also including others to be certain that everyone gets the identical message. However, be certain that the people being 'kept in the loop' actually need or want that information. Those on the CC list are usually not expected to reply; the message is for their information only.
- BCC is convenient when you wish to retain privacy of people's email addresses, as BCC recipients will not be visible to others. However, using the BCC field has its own set of concerns. For example, the BCC is sometimes used when the email sender has some possible ulterior motive for wanting the BCC recipient to see the message, but not wanting others to know. As such, always use CC and BCC cautiously and appropriately.

Source: 'Effective Writing—plain English at work', E.M. Murphy, (2014) and 'Writing email' course, [www.lynda.com](http://www.lynda.com)

### Example 4: Email

The below example of an email shows how ‘cc’ and ‘bcc’ can be used.

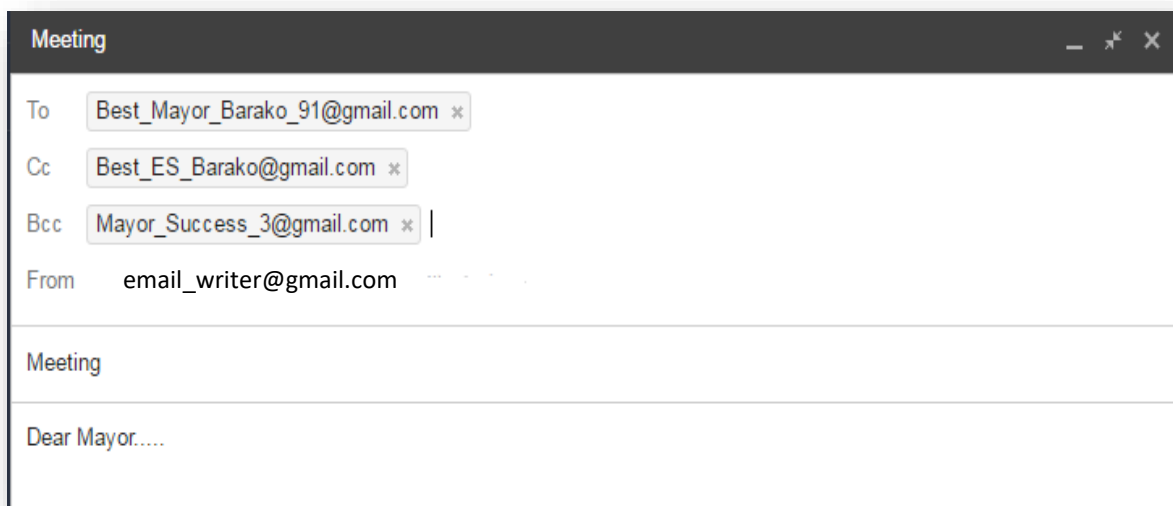
The email is written for the Mayor of Barako District ([Best\\_Mayor\\_Barako\\_91@gmail.com](mailto:Best_Mayor_Barako_91@gmail.com))

The subject of the email is ‘Meeting’, so the email must be about some kind of meeting.

The writer of the email is usually shown in the ‘From’ section. In this case we don’t know exactly who the writer is, but the email address is [email\\_writer@gmail.com](mailto:email_writer@gmail.com)

The writer has ‘cc’d’ the Executive Secretary of Barako District ([Best\\_ES\\_Barako@gmail.com](mailto:Best_ES_Barako@gmail.com)) so we assume that it is useful for the Executive Secretary to know about the contents of the email for some reason.

The writer has also included a ‘bcc’ to the Mayor of Success District ([Mayor\\_Success\\_3@gmail.com](mailto:Mayor_Success_3@gmail.com)). For some reason the writer wants the Mayor to see this email, but without the Barako Mayor or the Barako ES knowing about it, which is why the writer has used ‘bcc’.



### *Exercise 1: Email analysis*

Work in small groups to consider the above example and discuss and answer the following questions:

- What information do you think the writer might intend to include in the email to the Barako District Mayor? (be specific)
- Who do you think the email writer could be?
- Why do you think the ES of Barako District has been ‘cc’d’ on the email? Try to think of some possible, specific reasons.
- What might be some possible reasons for including the Mayor of Success District as a ‘bcc’ on this email?

## *Exercise 2: Letter analysis*

In this activity you will analyse an example letter that has been written by the Mayor of Sandy Desert District Council in response to a letter sent by the Mayor of Success District.

You will work in small groups of 3-4 people for this activity.

You need to refer to **Exercise Sheet 1** below.

Read the letter and consider the following:

- Is there any information missing from this letter?
- Is there anything in this letter which is not in line with the suggestions given in **Table 4** above?
- Is there anything in this letter which is not clear to you as the reader?
- What other suggestions would you make to improve this letter?

Following a plenary discussion on the above, you can refer to the improved example letter in **Exercise Sheet 2** below.

### **Exercise Sheet 1**

Sandy Desert District Council  
District Mayor  
Success District  
3/4/16

**RE:**

Dear Mayor,

I disagree with your letter.

You say you want to cooperate with us but your letter tells us the opposite.

Let us sit together to discuss this matter.

From,

District Mayor  
Sandy Desert District

## Exercise Sheet 2

*Suggestions for improvement:*

- A letter from one Mayor to another should be formal and respectful.
- The date used is a number format, which can sometimes cause confusion between US and UK methods of dates.
- No addresses given for either district.
- Nothing written in the subject heading line.
- The content of the letter itself is not clear – we don't know which letter the Sandy Desert District Mayor is referring to.
- The letter is not clear on what the issue is that the Mayors need to cooperate on.
- The letter suggests a meeting, but does not propose any date, time or venue.
- No friendly comment or reference to future contact before signing off.
- The sign off should be with 'Yours sincerely' or a similar level of formality.

*See below for an improved version of the above letter.*

Sandy Desert District Council  
Palm Rd, Unity Town  
Sandy Desert District

District Mayor  
Success District  
District Office, Achievement Rd  
Friendly Town, Success District

3 April 2016

**RE: Cooperation on joint development of district market place**

Dear Mayor,

Thank you for your recent letter dated 20 March 2016 regarding the proposed cooperation between our two districts in the development of a market place that will service both Sandy Desert and Success Districts.

What you have proposed sounds agreeable in principle. However, I have some concerns regarding the implementation of such a major development process.

I suggest that we meet to discuss the matter further. Would you be available to attend a meeting here at Sandy Desert District Office in the week commencing 10 April? Please advise on what would be a convenient date and time for you to meet.

I look forward to meeting with you in the anticipation of successful collaboration between our districts.

Yours sincerely,

*Name of Mayor*  
District Mayor  
Sandy Desert District

cc:

### *Exercise 3: Email, Memo, Letter writing*

Using what you have learned in this topic, work in a group to prepare an email, letter or memo (no more than 4 paragraphs) for the following situations below.

#### **Group 1: Write an email**

Write an email to a colleague, informing your colleague about some upcoming training in HRM Modules 1-5 and suggesting that they apply to their supervisor so that they can attend (invent any details that you need, for example, when and where the training will take place, how long it will go for, and what the benefits will be as a result of the training).

#### **Group 2: Write a memo**

Write a memo to your immediate supervisor at work (Department Director) to apply for permission to attend training in HRM Modules 1-5 that is to be conducted in your organisation soon (invent any details that you need, for example, when and where the training will take place, how long it will go for, and what the benefits will be as a result of the training).

#### **Group 3: Write a letter**

You are the Executive Secretary, and some of your staff have recently participated in training in HRM Modules 1-5. Draft a letter, addressed to the trainers who came to your district to deliver the training, thanking them for their efforts on behalf of the course participants (invent any details that you need, for example, when and where the training took place, how long it went for, and what benefits you expect to see as a result of the training).

**Refer to the following places in your Participant Book for more information:**

*Table 1: Overview of written communication*

*Table 2: Letters and memos—some different characteristics*

*Table 3: Letter and memos—some differences in formatting*

*Table 4: Writing a letter*

*Key points: Writing emails*

## Session 2

## Report Writing

### *Learning Objectives*

By the end of this topic participants will be able to:

- Differentiate between the different types of reports they are expected to produce as part of their work role.
- Prepare an accurate and concise work report for their supervisor.



### *Questions for Discussion*

- Who are you required to report to and what written reports are you expected to prepare as part of your work role?

### Key Points: Written Reports

Reports are a useful means of communication because:

- It is important to have a written record of activities undertaken.
- Reports are an effective way of providing updates or advice without having to be in the same location as the reader.
- Written reports are important mechanisms for transparency and accountability.

A written report can also be used to:

- record routine or non-routine events
- make informed decisions
- describe, analyse or persuade
- make recommendations for further action.

### Table 5: Types of Reports

The types of reports district officers are typically expected to produce include:

| Type of report  | What is it?  | Format   |
|-----------------|--|--|
| Monthly Reports | <p>Reports written by district staff about their work activities during the month.</p> <p>At the end of each month, each officer should write a report on their outputs and activities for their supervisor as stipulated above. This should include a</p> | See <b>Annex 22</b> of the Office Management and Administration Manual |

|                                       |  |  |
|---------------------------------------|--|--|
|                                       | <p>concise account of what has happened for that output that month.</p> <p>It should include:</p> <ul style="list-style-type: none"> <li>• activities undertaken and results achieved</li> <li>• any challenges met and recommendations to address</li> <li>• any follow up action needed.</li> </ul> <p>Staff can also report to their supervisors informally during the course of the month as needed.</p>   |  |
| Quarterly Reports                     | <p>These are produced by each department, outlining the activities carried out during the quarter.</p> <p>All official reports on activities, meetings or workshops held during the quarter should be circulated to the Mayor and Deputy, Executive Secretary and Directors of departments. Such reports are for internal use.</p> <p>The Quarterly Report contains the following headings:</p> <ul style="list-style-type: none"> <li>• Summary</li> <li>• Background/Political Situation</li> <li>• Activities undertaken</li> <li>• Results achieved</li> <li>• Challenges and Recommendations</li> </ul> | See <b>Annex 23</b> of the Office Management and Administration Manual |
| Annual Report                         | <p>These are produced by each department, outlining the activities carried out during the year.</p> <p>The Annual Report contains the following headings:</p> <ul style="list-style-type: none"> <li>• Executive Summary</li> <li>• Objectives</li> <li>• Progress</li> <li>• Resources and Budget Delivery</li> <li>• Work Plans for next year</li> </ul>   | See <b>Annex 24</b> of the Office Management and Administration Manual |
| Travel Activity/Back to Office Report | <p>Reports written by staff after returning from a work related trip, which provide information about the outputs achieved and any issues to follow up as a result.</p> <p>A travel activity report should include:</p> <ul style="list-style-type: none"> <li>• Objectives of travel and outputs achieved</li> </ul>  | See <b>Annex 17</b> of the Office Management and Administration Manual |

|  |   |  |
|--|---|--|
|  | <ul style="list-style-type: none"> <li>• Summary of activities</li> <li>• Issues for follow up</li> <li>• Challenges and solutions</li> </ul> |  |
|--|---|--|

### Key points: How to write a report

It can often be difficult to write the main body of a report—usually because it is hard to know what to include and what to leave out, and how to explain things in a concise way.

This is a skill which does improve over time and with practice—in the meantime, the table below offers some guidance.

**Table 6: Steps in preparing a report**

|   |   |
|---|---|
| <b>Starting off</b>                           | <p>Start by asking yourself some questions:</p> <ul style="list-style-type: none"> <li>• Why am I writing this?</li> <li>• What do I want to achieve?</li> <li>• Who will read this?</li> <li>• What does my reader want to know?</li> <li>• How will this be used?</li> <li>• When is this needed?</li> </ul>  |
| <b>Plan scope, outline, tasks, scheduling</b> | <ul style="list-style-type: none"> <li>• The scope of the report should be defined - What is the report about? What is it <u>not</u> about?</li> <li>• Plan an outline of the report, showing sections and headings.</li> <li>• Write down your ideas in note form.</li> <li>• Work out how much time you have to prepare it – keep in mind that a report often takes longer to prepare than you think!</li> </ul>  |
| <b>Use of data</b>                            | <ul style="list-style-type: none"> <li>• What information will you need? For example, books, journals etc. These are called <u>secondary</u> sources of data.</li> <li>• Do you also need to conduct some interviews or surveys? These are called <u>primary</u> sources of data.</li> </ul>  |
| <b>Draft, set aside</b>                       | <ul style="list-style-type: none"> <li>• Brainstorm all your ideas and eliminate any that are not relevant.</li> <li>• Then write a draft report.</li> <li>• Put it away for a day or so and then look at it again.</li> </ul> <p>How to draft the main body of a report:</p> <ul style="list-style-type: none"> <li>• The aim of reporting is to be clear and concise. This does not mean to leave out important information, but rather to choose which information is the <i>most</i> relevant.</li> </ul> |

|   |   |
|---|---|
|   | <ul style="list-style-type: none"> <li>• To ensure you do not include material which could safely be left out, you should ask: 'Is it <i>necessary</i> for this information to be included?' and 'What benefit does this information give the reader if I do include it?'</li> <li>• If you cannot clearly see how the information will benefit the reader, then it should be left out. This includes information that is 'nice to know', rather than 'need to know'.</li> <li>• Review the content of the draft document. Are all the ideas relevant? Is there anything you need to cut out?</li> <li>• Think about using attachments to cover detail that the reader may need at a later stage, but does not need in order to understand the main message.</li> <li>• Decide how to show the significance of your facts. Would some graphs or diagrams help the readers understand your message? What visual material will you use? How will you produce it?</li> </ul> |
| <b>Checklist (for individual reports)</b> | <ol style="list-style-type: none"> <li>1. Have I included progress on all outputs in my work plan?</li> <li>2. Have I flagged up any issues or challenges to my supervisor?</li> <li>3. Have I written it clearly so that anyone could understand it?</li> <li>4. Is all the information relevant?</li> <li>5. Is the style clear, concise and professional?</li> <li>6. Have I checked spelling, grammar and punctuation?</li> <li>7. Have I carefully proof-read my final draft?</li> </ol>   |
| <b>Edit, produce, deliver, evaluate</b>   | <ul style="list-style-type: none"> <li>• Check your final draft for any grammar/spelling mistakes.</li> <li>• Produce your report in a neat and professional way.</li> <li>• Deliver your written report (in some cases you may have to deliver your report in a speaking presentation).</li> <li>• Evaluate—does your audience like it?</li> </ul>   |

Source: Above table adapted from 'Writing and Presenting Reports', B. Eunson (1994), John Wiley & Sons, Australia.



### **Important!**

To be completely successful, a report which makes recommendations must ensure that the intended recipient:

- reads the report without delay
- understands everything in the report easily
- accepts the facts, conclusions and recommendations
- decides to take the recommended action.

**Example 5: Monthly Report**Name: ...*Mohamed Planwell, Planning Officer*.....Department:.....*Planning*..... Month: .....*May 2016*.....**Activities undertaken**

This should outline all the activities carried out during the month and should identify the activities undertaken to achieve the results outlined below.

- *Preparation for site visits*
- *Arrange schedule for site visits and liaison with relevant VCs*
- *Organisation of transport and accommodation*
- *Note taking during site visits*

**Results achieved**

This summarises the results achieved by the staff member during the month.

- *Site visits undertaken to 3 recently completed project sites.*

**Challenges and Recommendations**

This looks at the issues that occurred during the month and how these were solved or recommendations on how to solve them.

- *Difficult to make contact with VCs, we need to start liaising with them earlier.*
- *Difficulties in organising transport and accommodation due to communication flow with other members of the site visit party. People did not provide the necessary details, which caused problems.*

Prepared by: .....*M. Planwell* ....(Officer)Position: .....*Planning Officer*.....Signature:..... *M Planwell*.....Date: .....*31 May 2016*.....Received by:.....*I. M.**Watching you*.....

(Supervisor)

Position: ...*Head of Section* .....Signature:.... *MMW/you* ~ .....Date: .....*31 May 2016*.....

## Action Plan – Module 1: Written Communication

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Prepare an action plan for *at least one thing* that you will try to implement on your return to the workplace, based on what you have learned in this training. Some examples have been provided for you, which you may also wish to implement in your workplace.

| Activity   | Who is responsible?   | By when?                                      | What do I need to help me achieve this goal?  |
|--|---|---|---|
| <i>Example 1: Prepare all memos, letters and circulars according to the examples provided in the training materials.</i>                           | <i>Myself and encourage all other colleagues to use the same template.</i>      | <i>Within 1 week of completing training.</i>  | <i>Electronic copy of the module in order to set up the template for the memo.</i>                                  |
| <i>Example 2: Identify a suitable and consistent letterhead for preparing formal letters, get this approved for use and use this consistently.</i> | <i>Department of Admin &amp; Finance—discuss with supervisor and Executive.</i> | <i>Within 1 month of completing training.</i> | <i>Support from senior staff. Approved letterhead to be made available in electronic copy to use as a template.</i> |
| <i>Example 3: Prepare my next monthly report according to the format and example provided in the training materials.</i>                           |   |   |   |

Your entry here....

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## Conclusion

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### Summary

In this topic you have learned about the following:

- The communication cycle and how to avoid it breaking down when it comes to written communication.
- An overview of three main forms of written communication in the office—letters, memos and emails.
- Some of the main communication lines used within the district council and administration (internal and external), and the relevant sections of the HRM manual that support this.
- Some key differences between (internal) memos and (external) letters.
- Key points about memos: sending, receiving, writing and actioning.
- Key considerations for when writing a formal letter and work-related emails.
- When and how to use ‘CC’ and ‘BCC’ in letters and emails.
- Analysis of an example letter to suggest improvements.
- Drafting an internal memo and external letter.
- Identifying the different types of reports.
- Some steps in preparing and writing a report.



### *Important!*

You have also been asked to make an entry in an Action Plan, which needs to be put into place back in your district, with specific responsibilities, timelines and mechanisms for follow up identified.

### Assessment and Evaluation

You will be asked to complete some post-test questions, to gauge how much you have learned in this training. Your trainer will ask you to provide some feedback on the training you have just participated in, through the conduct of an evaluation activity. Your feedback will be most helpful for the ongoing improvement of these training materials.

*Thank you!*