# Checklist for Reports

*This form can be used to evaluate several types of reports, including proposals and progress reports.*

### Introductory headings (or title page, if the report is formal)

Do the introductory headings include the

_____ Source

_____ Receiver

_____ Date submitted

_____ Addresses and telephone numbers

_____ Name of contact if not the person named as source

_____ Project number or other references

_____ Title of the report or subject line

 _____ Can this report be distinguished from others in the file?

 _____ Is the purpose or nature of the report clear, not just the topic?

_____ Does the layout of the page direct attention?

_____ Do the introductory headings embody a graphic hierarchy?

_____ Is the page aesthetically pleasing?

### Letter of Transmittal

_____ Does the letter present the report directly?

_____ Do the contents help the reader understand the purpose or situation?

_____ Do the contents reveal the importance or relevance of the report?

_____ Does the writer express appropriate professional enthusiasm for the opportunity to have completed this project?

_____ Is the style of the letter formal but warm?

### Abstract

_____ Has the writer chosen either an informative or descriptive abstract and followed its conventions?

_____ Does the abstract contain any words that cannot be understood in context? Is the abstract complete?

### Table of Contents, Table of Illustrations, or List of Figures

_____ Are the lists complete?

_____ Are the page numbers correct?

### Introductory Summary or Evecutive Summary

Does the foreword review

_____ the situation (or problem)

_____ issues, tasks, or questions that are involved in the problem

_____ the writer's responsibilities

_____ the writer's primary communication purpose (to request, recommend, explain, or propose)

_____ Does the summary of conclusions show a clear relation to the problem and issues?

_____ Are the recommendations clear and precise?

### Appendices

_____ Are the appendices titled in such a way that their relevance to the report is clear?

_____ Are the appendices arranged in the approximate order that a reader might need them?

_____ Are the pages of the appendices clearly numbered?

### For Proposals Only

_____ Explains why the work needs to be done

_____ Explains what benefits will result

_____ Explains what problem will be solved or what objective be accomplished

_____ Explains methods and project schedule

_____ Explains what methods will be used

_____ Explains who will use them

_____ Explains when the work will be done

_____ Includes a project schedule

_____ Explains proposer's qualifications

_____ Present costs

### *Far Progress Reports Only*

_____ Describes project succinctly but with sufficient detail for identification

_____ Stresses accomplishments

_____ Presents progress in a positive way

_____ Contains a problem-flagging section on the first page

If organized by time:

_____ Explains what work has been done in earlier periods

_____ Explains what work was done this period

_____ Contains sufficient information to enable management to make timely decisions

_____ Do the headings answer questions?

_____ Do the lead sentences forecast the message of each paragraph?

_____ Does the style of the writing make the main points highly visible?

_____ Does the report subordinate analytical machinery and emphasize results instead?

_____ Does the report distill recommendations?

Is the phrasing clear and memorable?

### *Report Evaluation*

_____ Does the report present something new?

_____ Does the report emphasize its argument?

_____ Does the organization make the logic clear?