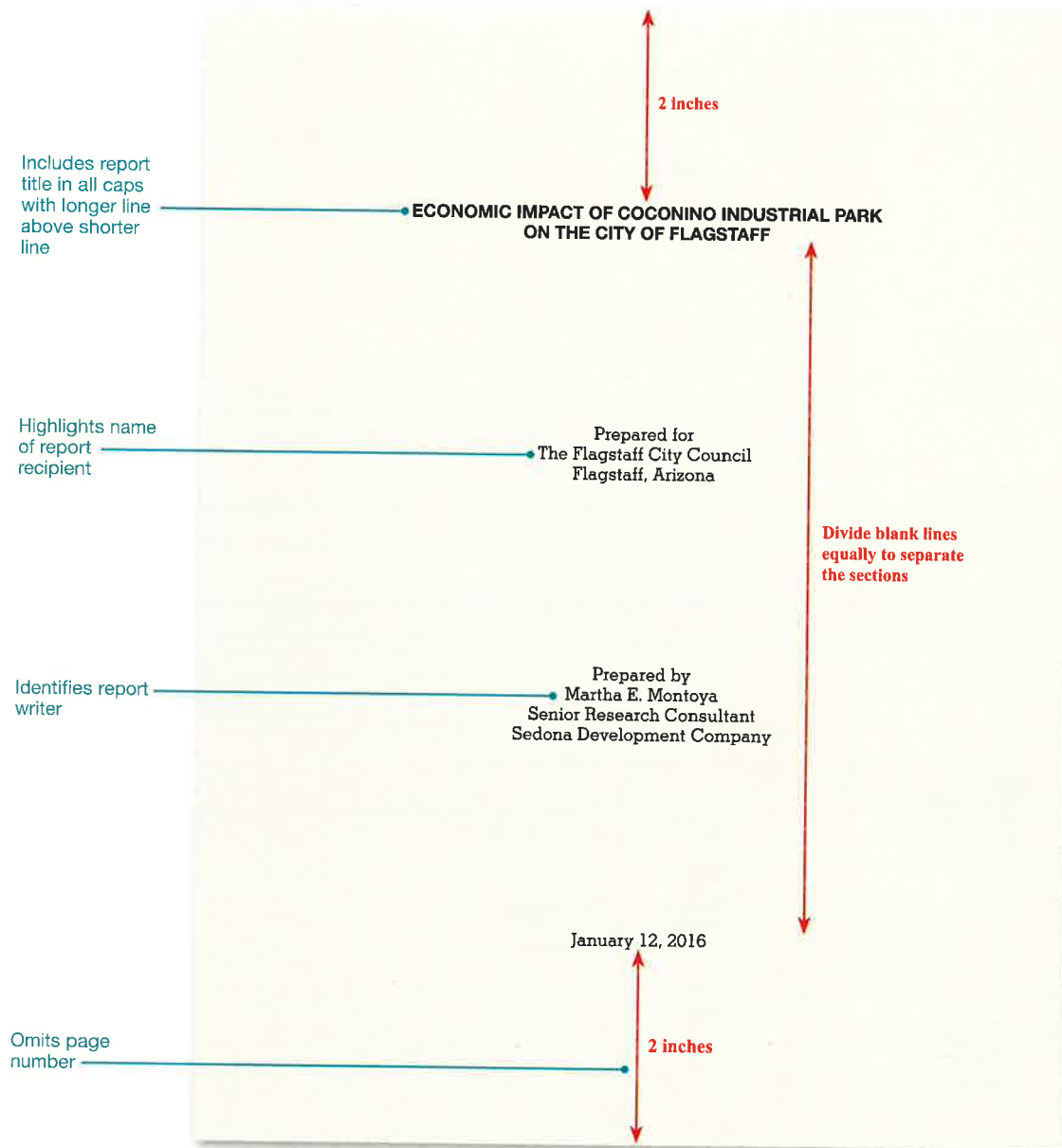


Figure 10.25 Model Formal Report With MLA Citation Format and Alternate APA Reference List



The title page is usually arranged in four evenly balanced areas. If the report is to be bound on the left, move the left margin and center point 0.25 inch to the right. Notice that no page number appears on the title page, although it is counted as page i. In designing the title page, be careful to avoid anything unprofessional—such as too many type fonts, italics, oversized print, and inappropriate graphics. Keep the title page simple and professional. This model report uses MLA documentation style. However, it does not illustrate double-spacing, the recommended format for research papers using MLA style. Instead, this model uses single-spacing, which saves space and is more appropriate for business reports.

Figure 10.25 (Continued) Letter of Transmittal

Announces report and identifies authorization

Gives broad overview of report purposes

Describes primary and secondary research

Offers to discuss report; expresses appreciation

Uses Roman numerals for prefatory pages



SEDONA DEVELOPMENT COMPANY

426 Sadleir Rock Circle
Sedona, Arizona 86340

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January 12, 2016

City Council
City of Flagstaff
211 West Aspen Avenue
Flagstaff, AZ 86001

Dear Council Members:

The attached report, requested by the Flagstaff City Council in a letter to Goldman-Lyon & Associates dated October 20, describes the economic impact of Coconino Industrial Park on the city of Flagstaff. We believe you will find the results of this study useful in evaluating future development of industrial parks within the city limits.

This study was designed to examine economic impact in three areas:

- Current and projected tax and other revenues accruing to the city from Coconino Industrial Park
- Current and projected employment generated by the park
- Indirect effects on local employment, income, and economic growth

Primary research consisted of interviews with 15 Coconino Industrial Park (CIP) tenants and managers, in addition to a 2014 survey of over 5,000 CIP employees. Secondary research sources included the Annual Budget of the City of Flagstaff, county and state tax records, government publications, periodicals, books, and online resources. Results of this research, discussed more fully in this report, indicate that Coconino Industrial Park exerts a significant beneficial influence on the Flagstaff metropolitan economy.

We would be pleased to discuss this report and its conclusions with you at your request. My firm and I thank you for your confidence in selecting our company to prepare this comprehensive report.

Sincerely,

Martha E. Montoya

Martha E. Montoya
Senior Research Consultant

MEM:coe
Attachment

ii

A letter or memo of transmittal announces the report topic and explains who authorized it. It briefly describes the project and previews the conclusions, if the reader is supportive. Such messages generally close by expressing appreciation for the assignment, suggesting follow-up actions, acknowledging the help of others, or offering to answer questions. The margins for the transmittal should be the same as for the report, about 1 to 1.25 inches for side margins. The dateline is placed 2 inches from the top, and the margins should be left-justified. A page number is optional.

Figure 10.25 (Continued) Table of Contents and List of Figures

Uses leaders to guide eye from heading to page number

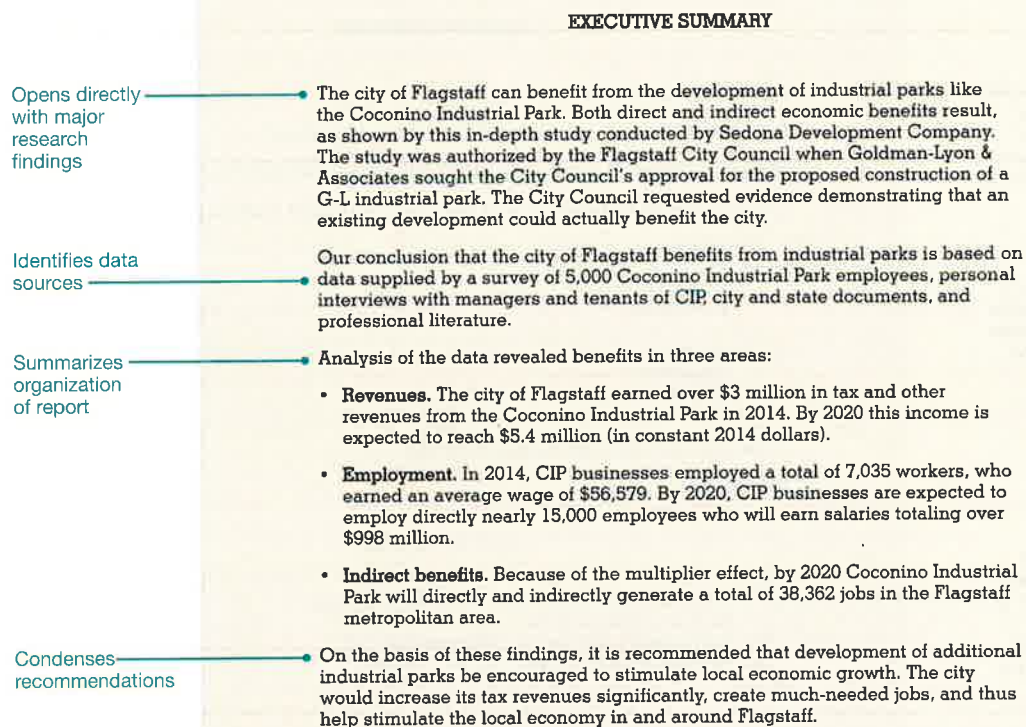
Indents secondary headings to show levels of outline

Includes tables and figures in one list for simplified numbering

TABLE OF CONTENTS	
EXECUTIVE SUMMARY	iv
INTRODUCTION: COCONINO AND THE LOCAL ECONOMY	1
BACKGROUND: THE ROLE OF CIP IN COMMERCIAL DEVELOPMENT	1
DISCUSSION: REVENUES, EMPLOYMENT, AND INDIRECT BENEFITS	2
Revenues	2
Sales and Use Revenues	3
Other Revenues	3
Projections	3
Employment	3
Distribution	3
Wages	4
Projections	5
CONCLUSIONS AND RECOMMENDATIONS	5
REFERENCES	6
LIST OF FIGURES	
Figure 1 Revenues Received by the City of Flagstaff From Coconino Industrial Park	2
2 Employment Distribution of Industry Groups	4
3 Average Annual Wages by Industry Groups	4

Because the table of contents and the list of figures for this report are small, they are combined on one page. Notice that the titles of major report parts are in all caps, while other headings are a combination of upper- and lowercase letters. This duplicates the style within the report. Advanced word processing capabilities enable you to generate a contents page automatically, including leaders and accurate page numbering—no matter how many times you revise. Notice that the page numbers are right-justified.

Figure 10.25 (Continued) Executive Summary



iv

For readers who want a quick overview of the report, the executive summary presents its most important elements. Executive summaries focus on the information the reader requires for making a decision related to the issues discussed in the report. The summary may include some or all of the following elements: purpose, scope, research methods, findings, conclusions, and recommendations. Its length depends on the report it summarizes. A 100-page report might require a 10-page summary. Shorter reports may contain 1-page summaries, as shown here. Unlike letters of transmittal (which may contain personal pronouns and references to the writer), the executive summary of a long report is formal and impersonal. It uses the same margins as the body of the report. See Chapter 9 for additional discussion of executive summaries.

Figure 10.25 (Continued) Page 1

Uses a bulleted list for clarity and ease of reading

Lists three problem questions

Describes authorization for report and background of study

Includes APA citation with author name and date

INTRODUCTION: COCONINO AND THE LOCAL ECONOMY

This study was designed to analyze the direct and indirect economic impact of Coconino Industrial Park on the city of Flagstaff. Specifically, the study seeks answers to these questions:

- What current tax and other revenues result directly from this park? What tax and other revenues may be expected in the future?
- How many and what kinds of jobs are directly attributable to the park? What is the employment picture for the future?
- What indirect effects has Coconino Industrial Park had on local employment, incomes, and economic growth?

BACKGROUND: THE ROLE OF CIP IN COMMERCIAL DEVELOPMENT

The development firm of Goldman-Lyon & Associates commissioned this study of Coconino Industrial Park at the request of the Flagstaff City Council. Before authorizing the development of a proposed Goldman-Lyon industrial park, the city council requested a study examining the economic effects of an existing park. Members of the city council wanted to determine to what extent industrial parks benefit the local community, and they chose Coconino Industrial Park as an example.

For those who are unfamiliar with it, Coconino Industrial Park is a 400-acre industrial park located in the city of Flagstaff about 4 miles from the center of the city. Most of the land lies within a specially designated area known as Redevelopment Project No. 2, which is under the jurisdiction of the Flagstaff Redevelopment Agency. Planning for the park began in 1999; construction started in 2001.

The original goal for Coconino Industrial Park was development for light industrial users. Land in this area was zoned for uses such as warehousing, research and development, and distribution. Like other communities, Flagstaff was eager to attract light industrial users because such businesses tend to employ a highly educated workforce, are relatively quiet, and do not pollute the environment (Cohen C1). The city of Flagstaff recognized the need for light industrial users and widened an adjacent highway to accommodate trucks and facilitate travel by workers and customers coming from Flagstaff.

The first page of a formal report generally contains the title printed 2 inches from the top edge. Headings for major parts of a report are centered in all caps. In this model document we show functional heads, such as **PROBLEM**, **BACKGROUND**, **FINDINGS**, and **CONCLUSIONS**. However, most business reports would use talking heads or a combination such as **FINDINGS REVEAL REVENUE AND EMPLOYMENT BENEFITS**. First-level headings (such as *Revenues* on page 2) are printed with bold upper- and lowercase letters. Second-level headings (such as *Distribution* on page 3) begin at the side, are bolded, and are written in upper- and lowercase letters. See Figure 9.6 for an illustration of heading formats. This business report is shown with single-spacing, although some research reports might be double-spaced. Always check with your organization to learn its preferred style.

The park now contains 14 building complexes with over 1.25 million square feet of completed building space. The majority of the buildings are used for office, research and development, marketing and distribution, or manufacturing uses. Approximately 50 acres of the original area are yet to be developed.

Provides specifics for data sources

Data for this report came from a 2014 survey of over 5,000 Coconino Industrial Park employees; interviews with 15 CIP tenants and managers; the annual budget of the city of Flagstaff; county and state tax records; and current books, articles, journals, and online resources. Projections for future revenues resulted from analysis of past trends and "Estimates of Revenues for Debt Service Coverage, Redevelopment Project Area 2" (Miller 79).

Uses combination heads

DISCUSSION: REVENUES, EMPLOYMENT, AND INDIRECT BENEFITS

Previews organization of report

The results of this research indicate that major direct and indirect benefits have accrued to the city of Flagstaff and surrounding metropolitan areas as a result of the development of Coconino Industrial Park. The research findings presented here fall into three categories: (a) revenues, (b) employment, and (c) indirect benefits.

Revenues

Coconino Industrial Park contributes a variety of tax and other revenues to the city of Flagstaff, as summarized in Figure 1. Current revenues are shown, along with projections to the year 2020. At a time when the economy is unstable, revenues from an industrial park such as Coconino can become a reliable income stream for the city of Flagstaff.

Places figure close to textual reference

Figure 1

REVENUES RECEIVED BY THE CITY OF FLAGSTAFF FROM COCONINO INDUSTRIAL PARK

Current Revenues and Projections to 2020

	2014	2020
Sales and use taxes	\$1,966,021	\$3,604,500
Revenues from licenses	532,802	962,410
Franchise taxes	195,682	220,424
State gas tax receipts	159,420	211,134
Licenses and permits	86,213	201,413
Other revenues	75,180	206,020
Total	\$3,015,318	\$5,405,901

Source: Arizona State Board of Equalization Bulletin. Phoenix: State Printing Office, 2014, p. 28.

Notice that this formal report is single-spaced. Many businesses prefer this space-saving format. However, some organizations prefer double-spacing, especially for preliminary drafts. If you single-space, don't indent paragraphs. If you double-space, do indent the paragraphs. Page numbers may be centered 1 inch from the bottom of the page or placed 1 inch from the upper right corner at the margin. Your word processor can insert page numbers automatically. Strive to leave a minimum of 1 inch for top, bottom, and side margins. References follow the parenthetical citation style (or in-text citation style) of the Modern Language Association (MLA). Notice that the author's name and a page reference are shown in parentheses. The complete bibliographic entry for any in-text citation appears at the end of the report in the works-cited section.

Continues
interpreting
figures in table

Sales and Use Revenues

As shown in Figure 1, the city's largest source of revenues from CIP is the sales and use tax. Revenues from this source totaled \$1,966,021 in 2014, according to figures provided by the Arizona State Board of Equalization (28). Sales and use taxes accounted for more than half of the park's total contribution to the total income of \$3,015,318.

Other Revenues

Other major sources of city revenues from CIP in 2014 include alcohol licenses, motor vehicle in lieu fees, trailer coach licenses (\$532,802), franchise taxes (\$195,682), and state gas tax receipts (\$159,420). Although not shown in Figure 1, other revenues may be expected from the development of recently acquired property. The U.S. Economic Development Administration has approved a grant worth \$975,000 to assist in expanding the current park eastward on an undeveloped parcel purchased last year. Revenues from leasing this property may be sizable.

Projections

Total city revenues from CIP will nearly double by 2020, producing an income of \$5.4 million. This estimate is based on an annual growth rate of 0.65 percent, as projected by the Bureau of Labor Statistics.

Employment

Sets stage for
next topic to be
discussed

One of the most important factors to consider in the overall effect of an industrial park is employment. In Coconino Industrial Park the distribution, number, and wages of people employed will change considerably in the next six years.

Distribution

A total of 7,035 employees currently work in various industry groups at Coconino Industrial Park. The distribution of employees is shown in Figure 2. The largest number of workers (58 percent) is employed in manufacturing and assembly operations. The next largest category, computer and electronics, employs 24 percent of the workers. Some overlap probably exists because electronics assembly could be included in either group. Employees also work in publishing (9 percent), warehousing and storage (5 percent), and other industries (4 percent).

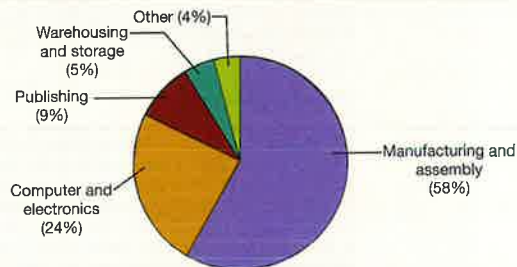
Although the distribution of employees at Coconino Industrial Park shows a wide range of employment categories, it must be noted that other industrial parks would likely generate an entirely different range of job categories.

Only the most important research findings are interpreted and discussed for readers. The depth of discussion depends on the intended length of the report, the goal of the writer, and the expectations of the reader. Because the writer wants this report to be formal in tone, she avoids *I* and *we* in all discussions.

As you type a report, avoid widows and orphans (ending a page with the first line of a paragraph or carrying a single line of a paragraph to a new page). Strive to start and end pages with at least two lines of a paragraph, even if a slightly larger bottom margin results.

Pie chart shows proportion of a whole and includes percentage figures for clarity

Figure 2
EMPLOYMENT DISTRIBUTION OF INDUSTRY GROUPS



Source: 2014 survey of CIP employees

Wages

Places figure close to textual reference

In 2014 employees at CIP earned a total of \$398 million in wages, as shown in Figure 3. The average employee in that year earned \$56,579. The highest average wages were paid to employees in white-collar fields, such as computer and electronics (\$65,200) and publishing (\$61,100). Average wages for workers in blue-collar fields ranged from \$48,500 in warehousing and storage to \$53,400 in manufacturing and assembly.

Figure 3

AVERAGE ANNUAL WAGES BY INDUSTRY GROUPS

Coconino Industrial Park, 2014

Industry Group	Employees	Annual Wages	Total
Manufacturing and assembly	4,073	\$53,400	\$217,498,200
Computer and electronics	1,657	65,200	108,036,400
Publishing	672	61,100	41,059,200
Warehousing and storage	370	48,500	17,945,000
Other	263	51,300	13,491,900
	7,035		\$398,030,700

Aligns figures on the right and centers headings over columns

Source: 2014 Survey of CIP employees

If you use figures or tables, be sure to introduce them in the text (for example, as shown in Figure 3). Although it isn't always possible, try to place them close to the spot where they are first mentioned. To save space, you can print the title of a figure at its side. Because this report contains few tables and figures, the writer named them all "Figures" and numbered them consecutively.

Clarifies information and tells what it means in relation to original research questions

Projections

By 2020 Coconino Industrial Park is expected to more than double its number of employees, bringing the total to over 15,000 workers. The total payroll in 2020 will also more than double, producing over \$998 million (using constant 2014 dollars) in salaries to CIP employees. These projections are based on a 9 percent growth rate (Miller 78), along with anticipated increased employment as the park reaches its capacity.

Future development in the park will influence employment and payrolls. One CIP project manager stated in an interview that much of the remaining 50 acres is planned for medium-rise office buildings, garden offices, and other structures for commercial, professional, and personal services (Novak interview). Average wages for employees are expected to increase because of an anticipated shift to higher-paying white-collar jobs. Industrial parks often follow a similar pattern of evolution (Badri, Rivera, and Kusak 41). Like many industrial parks, CIP evolved from a warehousing center into a manufacturing complex.

Combines conclusions and recommendations

CONCLUSIONS AND RECOMMENDATIONS

Analysis of tax revenues, employment data, personal interviews, and professional literature leads to the following conclusions and recommendations about the economic impact of Coconino Industrial Park on the city of Flagstaff:

Uses a numbered list for clarity and ease of reading

1. Sales tax and other revenues produced over \$3 million in income to the city of Flagstaff in 2014. By 2020 sales tax and other revenues are expected to produce \$5.4 million in city income.
2. CIP currently employs 7,035 employees, the majority of whom are working in manufacturing and assembly. The average employee in 2014 earned \$56,579.
3. By 2020 CIP is expected to employ more than 15,000 workers producing a total payroll of over \$998 million.
4. Employment trends indicate that by 2020 more CIP employees will be engaged in higher-paying white-collar positions.

On the basis of these findings, we recommend that the City Council of Flagstaff authorize the development of additional industrial parks to stimulate local economic growth. The direct and indirect benefits of Coconino Industrial Park strongly suggest that future commercial development would have a positive impact on the Flagstaff community and the surrounding region as population growth and resulting greater purchasing power would trigger higher demand.

As the Coconino example shows, gains in tax revenue, job creation, and other direct and indirect benefits would follow the creation of additional industrial parks in and around Flagstaff.

After discussing and interpreting the research findings, the writer articulates what she considers the most important conclusions and recommendations. Longer, more complex reports may have separate sections for conclusions and resulting recommendations. In this report they are combined. Notice that it is unnecessary to start a new page for the conclusions.

Figure 10.25 MLA Works Cited

Arranges
references in
alphabetical
order

Works Cited

- Brochure — Arizona State Board of Equalization. *Bulletin*. Phoenix State Printing Office, 2014, 26-29. Print.
- Journal with doi — Badri, Joseph, H. Jose Rivera, and Michael E. Kusak. "A Comparison of Sustainability and Economic Development in Urban Industrial Parks." *Journal of Industrial Ecology*, 24.4 (2011): 233-268. Print. doi 10.1078/0366-6133.25.335
- Newspaper article — Cohen, Andrew P. "Industrial Parks Invade Suburbia." *The New York Times* 14 Dec. 2014: C1. Print.
- Website without author or date — Fighting Poverty and Protecting the Environment: Development of a Sustainable Technologies Industrial Park. (n.d.). Web. 7 June 2015.
- Book — Miller, Aaron M. *Redevelopment Projects: Future Prospects*. New York: Rincon Press. Print.
- Online article — Pearson, Sophie. "Travel to Work Characteristics for the 50 Largest Metropolitan Areas by Population in the United States." *The Wall Street Journal* 30 June 2013. Web. 3 July 2013.
- Government publication — U.S. Department of Labor, Bureau of Labor Statistics. *Overview of the 2010-2020 Projections*. 2014: n pag. Web. 5 June 2015.

On this page the writer lists all references cited in the text as well as others that she examined during her research. The writer lists these citations following the MLA referencing style. Notice that all entries are arranged alphabetically. The *MLA Handbook for Writers of Research Papers*, Seventh Edition, 2009, requires italics for titles of books, magazines, newspapers, journals, and Web sites. For electronic sources, the following sequence is suggested: author or editor names; article name in quotation marks; title of website, project, or book in italics; any version numbers available; publisher information, including the publisher name and publishing date; page numbers, if available; medium of publication (such as *Web*, *Print*, or *PDF*); access date; and URL if necessary for retrieval or required by your instructor.

This works-cited page is shown with single-spacing, which is preferable for business reports. However, MLA style recommends double-spacing for research reports, including the works-cited page.

Figure 10.25 Alternate References Shown in APA Style

Arranges
references in
alphabetical
order

References	
Brochure	Arizona State Board of Equalization Bulletin. (2014). Phoenix: State Printing Office, 26-29.
Journal with doi	Badri, J., Rivera, H., & Kusak, M. (2011) A comparison of sustainability and economic development in urban industrial parks. <i>Journal of Industrial Ecology</i> , 24(4), 233-268. doi: 10.1078/0366-6133.25.335
Newspaper article	Cohen, A. P. (2014, December 14). Industrial parks invade suburbia. <i>The New York Times</i> , p. C1.
Website without author or date	Fighting poverty and protecting the environment: Development of a sustainable technologies industrial park. Retrieved from http://www.smart-communities.ncat.org/success/northam.shtml
Book	Miller, A. M. (2013). <i>Redevelopment projects: Future prospects</i> . New York: Rincon Press.
Online article	Pearson, S. (2013, June 30). Travel to work characteristics for the 50 largest metropolitan areas by population in the United States. Retrieved from http://www.wsj.com/article 130630
Government publication	U.S. Department of Labor, Bureau of Labor Statistics. (2014). <i>Overview of the 2010-2020 Projections</i> . Retrieved from http://www.bls.gov/ooi/About/Projections-Overview.htm

If this formal report had used APA referencing style, the references would appear as shown here. The writer lists all references cited in the text as well as the writer lists all references cited in the text as well as others that she examined during her research. The writer lists these citations following the APA referencing style. Notice that all entries are arranged alphabetically. Book and periodical titles are italicized, but they could be underlined. When referring to online items, she shows the full name of the citation and then identifies the URL as well as the date on which she accessed the electronic reference. This references page is shown with single-spacing, which is preferable for business reports. However, APA style recommends double-spacing for research reports, including the references page.

SUMMARY OF LEARNING OBJECTIVES

10-1 Understand the importance, purpose, and components of informal and formal proposals.

- Proposals are written offers that solve problems, provide services, or sell products.
- Proposals may be solicited (requested by an organization) or unsolicited (written to offer a service, request funding, or solve a problem).
- Components of informal proposals often include an introduction; a background and purpose statement; a proposal, plan, and schedule; staffing requirements; a budget showing project costs; and a conclusion.
- Formal proposals often include additional components, such as a letter of transmittal, a title page, a table of contents, and an appendix.

10-2 Describe the steps in writing and editing formal business reports.

- Writers begin formal reports with a statement of purpose that defines the focus of the report.
- Report writers focus on their readers' needs and wants in order to present relevant findings.
- Researchers gather information from primary sources (firsthand observation, interviews, and surveys) and secondary sources (books, articles, journals, and the Web).
- Writers proofread and edit formal reports by reviewing the format, spacing and font consistency, graphics placement, heading levels, data accuracy, and mechanics.

10-3 Conduct research using primary and secondary sources, and understand how to assess the credibility of resources.

- Writers gather most of their research from secondary sources by reading what others have published in books, scholarly journals, magazines, and Web documents.
- Web researchers find the information they want by using search operators and advanced search features to filter the results.
- Good writers assess the credibility of each Web resource by evaluating its currency (last update), author or sponsoring organization, content, purpose, and accuracy.
- Report writers gather data from primary sources by distributing surveys, conducting interviews, and collecting data from firsthand observation.

10-4 Identify the purposes and techniques of documenting and citing sources in business reports.

- Documenting sources means giving credit to information sources to avoid plagiarism.
- Copyright refers to “the right to copy”; under fair use, individuals have limited use of copyrighted material without requiring permission.
- Writers should assume that all intellectual property (words, charts, photos, music, and media) is copyrighted and protected whether or not it has a copyright notice.
- Common citation formats include the Modern Language Association (MLA), the American Psychological Association (APA), and the Chicago Manual of Style (CMS).

10-5 Convert report data into meaningful visual aids and graphics.

- Graphics clarify data, add visual interest, and make complex data easy to understand; they should be placed close to where they are referenced.
- Tables show quantitative information in systematic tables and rows; they require meaningful titles, bold column headings, and a logical data arrangement (alphabetical, chronological, etc.)
- Bar charts and line charts show visual comparisons using horizontal or vertical bars or lines of varying lengths; pie charts show a whole and the proportion of its components; flowcharts diagram processes and procedures.
- Infographics, popular in online environments, combine images and graphic elements to illustrate information in an easy-to-understand format.

10-6 Describe the components of typical formal reports.

- Front matter components of formal reports often include the following: title page, letter or memo of transmittal, table of contents, list of figures, and executive summary.
- Body components of formal reports include the introduction, the body, and the conclusions and recommendations.
- The body is the principal section of a formal report and discusses, analyzes, interprets, and evaluates the research findings before drawing conclusions.
- Back matter components of a formal report include a bibliography, which may be a works-cited or reference page, and any appendices.

CHAPTER REVIEW

1. For what reasons do writers prepare proposals? (Obj. 1)

Formal and informal proposals are written to solve problems, provide services, sell products, or request funding.

2. For what reasons would government agencies and other firms use requests for proposals (RFPs)? Name an example of a project that might require an RFP. (Obj. 1)

Government agencies and other firms use requests for proposals (RFPs) to solicit competitive bids on projects when they have a specific need. RFPs ensure that bids are comparable and that funds are awarded fairly. Students' examples will vary. An example of a government RFP might be a request for bids that detail the construction of a visitors' center in a national park.

3. What is the purpose of providing a “hook” in the introduction of a proposal? Give three examples. (Obj. 1)

A hook is used to grab attention and make the introduction more persuasive. Student examples might include any of the following hooks: (a) the expectation of an extraordinary result, (b) a promise of lower costs and speedy results, (c) a remarkable resource available exclusively to the proposal recipient, (d) a promised solution to an existing problem, or (e) a key benefit at the heart of the proposal.