RECOMMENDATION AND FEASIBILITY REPORTS

Introduction

Professionals in all areas make recommendations. Someone must investigate alternatives and say "choose A" or "choose B." The "A" or "B" can be anything: which type of investment to make, whether to relocate a department, which machine to purchase, etc.

Recommendation reports indicate a choice between two or more clear alternatives: this distributor or that distributor, this brand of computer or that brand of computer.

Feasibility reports investigate one option and decide whether it should be pursued. Should the client start a health club? Should the company form a captive insurance company? Should the company develop a prototype? This chapter explains how to plan and write both types of reports.

Assignment

Recommendation or Feasibility Report Assignment
Write a recommendation or feasibility report associated with your research topic in which you establish, explain, and evaluate options by discussing specific criteria.

Planning Recommendation Report

Consider Audience
Many different people with will look at the recommendation report as it travels up the organization hierarchy—The human resource manager will look at how the recommendation affects workers, the safety manager will judge the effect on safety, etc. To satisfy such readers, the writer must present a report that enables them all to find and glean the information they need.

Choose Criteria
Suppose you were to investigate which of two jointers to place in a high school woods lab. To make the decision, you need to find the relevant criteria and create the standards from which the jointers will be measured. An example may be:

Technical
   Does the jointer have the correct fence size? Table length? Cutting capacity?
Financial
   How much does each jointer cost?
   How much money is available?
   How much do optional features and warranties cost?

Management/Maintenance
> Which one is safer?
> Will the jointers be available by August?

Use Visual Aids

You may use a variety of visuals: maps, statistics, flow charts, tables, graphs, etc. Consider using a visual with each section in your report. Construct the table or figure first and then write the section to explain the data in it.

Select a Format and an Organizational Principle

As you plan your report, you must select a format, an organizational principle for the entire report, and an organizational principle for each section.

- **Select a Format**

  Create a style sheet of heads and margins. Your style sheet should help your audience find what they need to do their job. Decide how formal to format your paper according to how familiar the audience is with the situation.

- **Organize the Discussion by Criteria**

  Organize the discussion section according to criteria, with each criterion receiving a major heading. Your goal is to make this easy for the readers.

- **Organize Each Section Logically**

  Each section deals with one criterion and should contain three parts: an introduction, a body, and a conclusion. In the introduction, define the criterion and discuss its standard, rank, and source, if necessary. In the body, explain the relevant facts about each alternative in terms of the criterion; in the conclusion, state the judgment you have made as a result of applying this criterion to the facts.

Planning Recommendation Report

Organizing Recommendation Report

Recommendation reports often are organized differently that other reports. Readers often expect an explanation of criteria followed by conclusions and recommendations at the beginning of the report with all of the supporting discussion following. Conclusions should summarize the most significant information about each criterion

Organizing Recommendation Report

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covered in the report. Consider this organization for your recommendation or feasibility report.

I.   Introduction
    A.   Statement of purpose
    B.   Explanation of method of investigation
    C.   Statement of scope
    D.   Explanation of the problem
II.   Criteria and Standards
III. Conclusions
IV.   Recommendations
V.   Discussion

After you have gathered and interpreted the data, develop an introduction that orients the readers to the problem and to the organization of the report. Four common elements in the introduction are: statement of purpose, explanation of method of investigation, statement of scope, and explanation of the problem.

Introduction

- **Purpose**
  Begin the recommendation report with a straightforward statement such as "The purpose of this report is…" or, "This report recommends…"

- **Method of Gathering Information**
  State your method of gathering information. The four major methods of gathering data are observing, testing, interviewing, and reading. Stating your methodology gives credit where it is due, and lends authority to your data and report. In the introduction, a general statement of your model of investigation is generally sufficient: "Using lab and catalog resources here at the university and after discussion with other Industrial Arts teachers in the area, I have narrowed my choices to two: Delta Model D20 and Powermatic Model 60."

- **Scope**
  In the scope statement, cite the criteria you used to judge the data. Here is an example: Each machine has been evaluated using the

Organizing Recommendation Report

following criteria, listed in order of importance: cost, cutting capacity, table length, fence size.

- **Background**
  In the background, discuss the problem, the situation or both. To explain the problem you must define its nature and significance: "Considering that the machine has been under continuous student use for 27 years and has reduced accuracy because of the small table and fence size, I indicated I would contact you regarding a new jointer."

Criteria and Standards

Cite the criteria you used to judge the data. You can explain their source or their rankings here. Name the criteria in the order in which they appear in your report. If you have not included a particular criterion because data are unavailable, acknowledge this omission so readers will know you have not overlooked that criterion. Here is an example:

> Each machine has been evaluated using the following criteria, in descending order of importance:
> 1. Fence size
> 2. Table length
> 3. Cutting capacity
> 4. Cost

Conclusions

Your conclusions should summarize the most significant information about each criterion in the report. "All elements in the criteria have been met. The slightly higher cost of the Delta, is more than offset by the capacities shown below:"

Recommendations

The recommendation resolves the problem that occasioned the report. For short reports, one to four sentences should suffice.

Discussion

You should organize the discussion section by criteria, from most to least important. Each criterion should have an introduction, a body

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discussing each alternative, and a conclusion.

Planning a Feasibility Report

Feasibility reports investigate whether to undertake a project. They size up a project before it is undertaken and identify those projects that are not worth perusing. The project can be anything: place a golf course at a particular site, start a capital campaign drive, or accept a proposal to install milling machines.

Consider the Audience

Generally your audience is familiar with the situation in a broad outline. Your job is to give specific information.

Determine the Criteria

Criteria are either established by a management committee or by experts in the field. These criteria usually include technical, management/ maintenance, and financial information.

Determine the Standards

To determine the standards is to state the limits of the criteria. If the policy is that a new machine purchase must show a return in investment of 20 percent, and if the machine under consideration will return 22 percent, buying the machine is feasible.

Choose a Format

The situation helps you determine whether to use a formal or an informal format. As a rule of thumb, use the formal format for a report intended for a group of clients, and the informal report to determine the feasibility of an internal suggestion.

Write the Introduction and Body

In the introduction, present appropriate background, conclusion, and recommendations. In the discussion, present the details for each topic. As with recommendation reports, you should present the topic, the standard, relevant details, and your conclusion in the report. Organize the material in the discussion section from most to least important. As with all reports, use appropriate visual aids, including tables, graphs, and maps, to enhance your readers' comprehension.

Planning Feasibility Report

Writing Feasibility Report

Checklist	**Checklist** ☐ Have you named the audience for the recommendation or feasibility report? ☐ How much do they know about the topic? ☐ What is your purpose in writing this report? ☐ Do you have a strong introduction for this report? ☐ Have you prepared the background for this report? ☐ Have you carefully established the criteria? ☐ Have you established the criteria based on technical, management, or financial questions? ☐ Have you ranked the criteria? ☐ Have you established alternative solutions for this report? ☐ What is your goal for the reader? ☐ Have you accurately incorporated documentation into this report? ☐ Have you considered visuals for this report? ☐ Is your writing clear?
Resource	**Resource** • Riordan, Chapter 15, "Recommendation and Feasibility Reports"