# Report Writing

# Quality Control Inspector

Learning Objectives

By attending this session, participants will be able to:

* Discuss the purpose of various reports.
* Describe the kinds of information to include in specific reports.
* Identify tips for writing a clear, concise, and useful report.
* Recognize and address patterns and trends.
* Explain how the tone of a report can affect worker morale and motivation.

Key Terminology

Call-back

Community action agency (CAA)

Cubic feet per minute (CFM)

DOE project officer (DOE PO)

Grantee

House as a system

Indoor air quality (IAQ)

Inspector

Monitor

Priority list

R-value

Savings-to-investment ratio (SIR)

Subgrantee

Technical field monitor

Training and technical assistance (T&TA)

Supplemental Materials

Handouts & Resources

Handout #1 − Pictures of attic hatches and Report A & Report B

Handout #2 − Pictures of whole-house fan covers

Handout #3 − Sample Report: Site Visits

Handout #4 – Sample Report Summary: Technical Evaluation

Report Writing Quiz.

Report Writing Quiz Answer Key.

Sample audit input report and recommended measures report.

Sample audit home diagram.

Sample monitoring reports 1 and 2.

**Classroom Props & Activities**

**Exercise #1**

Distribute Handout #1. Give students five minutes to read the reports. Note that both reports present the same information. Ask the following questions, recording class responses on a flip chart, whiteboard, or overhead:

Q: Which report will generate a more positive response?

A: Report B.

Q: Why?

A: It emphasizes positive statements throughout, provides clear instructions about what needs to be done and why, discusses things done right, and doesn’t make derogatory remarks about the crew.

Q: Which statement in Report A has absolutely no place in a report of this type?

A: “It is apparent that the time spent to date trying to train these incompetents in weatherization technology has been totally wasted.”

Discuss why.

If time allows, ask students to describe reports written about their work. As a class, discuss what the author did right and what they might have done better to elicit a more positive response from the recipient in each instance.

**Exercise #2**

Distribute Handout #2. Allow students 10 minutes to list good and not-so-good points about each pictured treatment, recommend training by position, and suggest training methods.

Whole house fan cover I:

* Good: Effective, inexpensive.
* Not so good: Not durable, one-time use only, appearance is unacceptable.
* Needed training: Auditor and crew chief need to be trained that installed measures must be durable (poly is not) and reusable (duct tape is one time use only) and must match the quality of the home. The installer needs training on using appropriate materials.

Whole house fan cover II:

* Good: Effective, inexpensive, fairly durable.
* Not so good: Duct tape will have to be replaced every time it is removed. The inconvenience will discourage reuse. The appearance is poor.
* Needed training: Auditor and crew chief need to be trained that installed measures intended for seasonal use must be reusable and must match the quality of the home. Installer needs training on using appropriate materials.

Whole house fan cover III:

* Good: Effective, relatively inexpensive, durable, convenient to remove and replace.
* Not so good: Appearance could be an issue in some homes. The auditor should clear the appearance with the homeowner.
* Needed training: Auditor may need training on choosing cosmetically acceptable measures.

Suggested training methods:

* Discuss training needs at periodic field staff meetings.
* Peer-to-peer training – Have the installers from Scenario III demonstrate methods to the installers from Scenarios I and II.

Return to slide #16, “Creating a Report.”

**Exercise #3**

Distribute Handout #3. Allow students 30 minutes to review the report, draft a summary of patterns and trends, and recommend necessary training by position. Keep a running list of patterns and trends on a flipchart, whiteboard, or overhead as students report their findings. Complete the outline and create a composite report and a training list as a group.

Trend:

* Underuse of infrared

Patterns:

* Dense-pack cellulose density not achieved
* Lack of attic air sealing
* Lack of attic duct sealing
* Building envelope poorly defined at furnace closets

Distribute Handout #4. Allow students five minutes to review it. As a group, discuss any differences between this report summary and the training list the class created based on Handout #3.

**Hands-On Props & Activities**

**Site Inspection**

Work with a local agency to bring students to a nearby completed or in-progress weatherized unit for a final inspection. Have half the students document the visit as a final inspection and the other half develop what they would include in a monitoring report. Is there a need for reworks? Are there any recommendations for follow-up training for the crew or auditor?

Are both groups in agreement? Have the students discuss the differences in how they approached their report writing.

If a site inspection is not possible, this exercise can be done using a video of an audit or final inspection, if one is available.

Note: If you were able to conduct a field-trip to practice hands-on building assessment as part of that lesson, use that home as the basis for students to draft reports.

Class Overview

If possible, provide sample reports before the training session, so trainees can review them prior to attending.

Review each report during or immediately following the appropriate section of the PowerPoint presentation. Lead discussions about:

* Good aspects of the report (i.e., content, format, style, language, diagrams, etc.).
* Bad aspects of the report (i.e., content, format, style, language, diagrams, etc.).
* What could have been added to the report?
* What might have been omitted from the report?