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# ***WRITING A PLANNING REPORT***

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**WRITING A PLANNING REPORT**

The essence of any professional occupation is the ability to structure and communicate knowledge concisely, and with clarity. This paper offers considered advice on composing a planning report, the proper use of words and technical terms, and makes suggestions for finishing and producing the final report.

By publishing this report the Canadian Institute of Planners acknowledges the value of the advice being offered. However, the reader should be cautioned not to treat the paper as an essential format for producing every report. The planner must carefully assess the needs of the client and structure the techniques and style of communication in order to best satisfy the client's needs.

The Canadian Institute of Planners would like to express its gratitude to Nigel Richardson for this paper and would note that the copyright to this material is exclusively his.

## AUTHOR'S PREFACE

There was a time when I was unfortunate enough to be in charge of a large staff, and my responsibilities of course included the review of draft reports before they moved further up the system. I found I had to spend a good deal of time editing, indeed sometimes rewriting, the output of very able professional people who did not seem to be able to express their ideas and recommendations in clear, or even comprehensible, well organised, written English. As I was then a civil servant, the consequence, naturally, was a memo, in which I pointed out the need for structure and clarity in the writing of reports. That memo was the genesis of this publication. It expanded by accretion over the years, largely for my own pleasure, and the result was published in the now defunct CIP Forum in 1977.

As I wrote to the editor of Forum at the time, Writing a Planning Report is ". . . highly subjective and opinionated, and some of it rather tongue in cheek. It should perhaps be entitled 'One Planner's Entirely Personal, Strongly Biased, Slightly Eccentric and Occasionally Indefensible Views on Writing a Planning Report'. This remains true. It is now also in part a defence of obviously lost causes (see, for example, the comments on "impact" and "hopefully"), because some causes are worth defending even when the struggle is hopeless, and the English language is one of them.

What Writing a Planning Report certainly is not, and should not be used as, is a substitute for standard guides and reference works, such as a good dictionary (absolutely indispensable), a thesaurus, a style manual (I suggest The Canadian Style, published by the Department of the Secretary of State), Fowler and Turabian, all of which every planner (and everyone else) should have available when writing a report. It may nevertheless be useful in providing some practical tips and in helping to avoid some particularly common mistakes and pitfalls. I hope it may even provide some readers with a little entertainment.

I continue to welcome readers' comments and suggestions, which have been valuable in revising the original version.

NHR

**PART I**

**COMPOSING THE REPORT**

## I. COMPOSING THE REPORT

### What Are You Trying To Do?

The purpose of any planning report is, in essence, to tell the recipient and other readers what you have found out and what you think ought to be done about it. It is not meant to dazzle them with your literary style or to impress them with real or pretended profundity or expertise. The report is a vehicle for the conveyance of information and ideas; it should be efficiently designed and carry a minimum of excess weight. In other words, you will accomplish your purpose best if your report is well organised, concise, and clearly and simply written.

This is also a good discipline for you, the author. Muddled writing usually reflects muddled thinking. If you can't express your ideas clearly, it probably means that you haven't really thought them out clearly.

### Who Is The Recipient?

"Recipient" is used here to mean the person or people to whom the report is addressed ("client" is often used in the same sense). A report always has a recipient, whether a politician or political body (mayor, council, planning board, minister, cabinet), a professional or bureaucratic superior, a private client, or the public. You should know whom you are writing for, and the content, tone and emphasis of your report should be determined accordingly. A single report cannot usually be written successfully for different recipients: for example, both the city council and the citizens at large (but see The Summary of a Report, below).

### Organising The Report

Obviously, planning reports differ greatly in content, length and style, depending on the subject and the recipient. But the general structure -- the main elements and the sequence in which they are presented -- does not. While the attention and emphasis given to each of the following components will depend on the nature of the report, in most cases they should all be included, whether as chapters, as a few paragraphs, or as a few sentences. Usually, they should be set out in the sequence indicated.

1. Summary (see below)

2. Introduction

This literally "introduces" the reader to the report by explaining how it originated, what its purpose is, how it relates to other studies or documents, and anything else the reader ought to know before getting into the "meat" of the report.

It may be appropriate to combine the introduction and the summary of a short report.

3. Background

Information the reader will need to understand the report, such as the location, population and other principal characteristics of the area dealt with.

4. Trends

What has been happening, is happening, and seems likely to happen in subject areas relevant to the concerns of the report, such as demographics, economy and land use.

5. Issues and Problems

This part of the report should explain why a plan or other action is needed, and what issues and problems the plan is intended to address.

6. The Aims of the Plan

This part should enable the reader to understand generally what your recommendations are intended to accomplish, before getting into their details. Depending on the nature of the report, it may take the form of a description of the "concept" or "scenario" aimed at.

7. The Plan (or Other Proposals) in Detail

This will probably be the bulk of the report. It should be coherently organised by sector, sub-area, nature of proposals, or whatever is appropriate, so that the reader does not get lost or hopelessly confused.

8. Implementation and Action Proposals

What needs to be done, by whom, how, when; if possible, what it will cost.

## 9. Conclusion

Whatever closing thoughts may be appropriate, particularly those points in your report which you think need emphasis. You may want to restate in the conclusion (not in identical words) the issues and problems the report is intended to respond to (5) and what your proposals are intended to accomplish (6).

## 10. Appendices

All detailed data and other material which is directly relevant or necessary for reference should be placed in appendices in order to avoid breaking the flow of the text. If the appendices become very bulky, consider putting them in a separate volume.

The above should not be treated as chapter headings. Items 3, 4, 5 and perhaps even 6 might all be included in a single chapter or section, while 7 may have to be broken up into several. The object is to secure a clear and complete sequence of ideas.

## The Summary

"Summary" seems to have been almost universally displaced by "executive summary". Yet in the vast majority of cases the grandiose "executive" summary is in fact only a humble summary, and the "executive" is entirely redundant and merely pretentious, serving no purpose but to pander to the reader's (and perhaps the writer's) sense of self-importance.

The summary is discussed as a separate subject because it is probably the most important part of your report. It is wise to assume that many of your readers, probably including those you most want to influence, will read only the first few pages; so those pages should contain, clearly and simply, the most important messages you want to convey: in particular, what you are trying to accomplish, how, and why.

The summary of any report should be no longer than about ten pages, and should be proportionately briefer for a short report (one friend of mine insists that it should never exceed a single page, which is a sound principle but may sometimes be overly Procrustean). If it is much more than a page, it should be broken into sections. These should explain clearly and concisely:

- your principal findings;
- the leading issues and problems (see above, 5);
- the aims of the plan (or other proposals) (see above, 6);
- your most important recommendations.

If the summary is done well, the reader should need to go through the rest of the report only for details, justification and elaboration.

The following is the Summary of The Summary of a Report, by E.A. Carruthers (Office of Economic Policy, Ontario Ministry of Treasury, Economics and Inter-governmental Affairs, March 1977):

"The summary presents the message of the report to readers who do not have time to read the full report. Such a summary is not a shrunken version of the original report, but a different report on the same subject, written for a different audience. As such, it cannot be prepared by condensing each section of the original report or by gathering together selected paragraphs, topic sentences, or other fragments.

"The full report is written for the writer's colleagues, peers, and immediate supervisor. These readers are interested both in the report's conclusions and in the writer's method of reaching those conclusions. The report accordingly documents these methods carefully, together with appropriate background material. The summary, on the other hand, addresses a more peripheral, often more highly placed, audience. These readers are interested chiefly in the report's findings and how these findings fit into a broader program. It should state the purpose of the report briefly (what the author wanted to find out and why), give the report's findings, and point out how these findings are significant to the program. It should note the scope of the report and any important limitations, but avoid describing methods in detail.

"A good summary is a short addition to the report. By enabling the report to address two groups of readers at the same time, however, a summary greatly increases the report's effectiveness."



### Ten Commandments

1. Know precisely whom your report is addressed to; organize and write it accordingly.
2. Think out what you want to say. Work out a clear, orderly sequence of ideas, and stick to it.
3. Omit the irrelevant and useless, even if you have spent three months working on it.
4. Write simply and concisely. Don't use a paragraph where a sentence or two will do.
5. Don't use long, pedantic, pompous words or phrases where short, simple, everyday ones will do (see Windbaggery, below); and be very wary of vogue words (see Vogue Words, below).
6. Avoid jargon, or techspeak, as far as possible. Use an everyday word rather than a jargon word whenever you can. When the use of jargon is unavoidable, make sure the recipient of the report will understand it, for example by using footnotes or a glossary.
7. Never use a word without being sure of its meaning. If in any doubt at all, look it up.
8. Use graphics wherever they will help to convey or clarify your meaning; but be sure they are well designed and clear.
9. Review, check and edit your own work carefully. Ask yourself: Have I said everything that should be said? Have I said it clearly? Have I followed a clear line of argument? Have I repeated myself? Have I mixed up different ideas? Have I padded? Would anything be lost if I left this out?
10. Always have ready access to standard references on the English language and (preferably) Canadian usage. Use them. Read Gowers' Complete Plain Words.

**PART II**

**WORDS AND THEIR USE**

## II. WORDS AND THEIR USE

### The Use, Misuse and Abuse of Words

Spoken and written (verbal) language is the chief medium whereby information and ideas are transmitted from one person to another. Those whose native or working language is English are fortunate in having at their disposal a versatile, subtle and sensitive instrument, which, if it is used properly, will do its job very well. If, however, it is used badly, the information and ideas which the user is trying to convey will be transmitted poorly or incompletely.

English is very much a hybrid language, evolving from several different roots, and its advantages as a medium of communication owe much to its adaptability, its capacity to incorporate new words and to accept new meanings for old ones, as it has been doing for nine centuries. But the language is enriched only when such changes enable meaning to be expressed more clearly or more exactly than before. (It is a common mistake to confuse the invention of a "new" word, or the "new" use of an old one, with the discovery of a genuinely new idea; often it is merely new packaging for an old and well-tried product.) When the use of words is changed in ways that obscure meaning, mislead, or distort, the language is impoverished rather than enriched; and all its users lose thereby.

Like any sensitive instrument, English loses much of its effectiveness when improperly used. By "proper" use I am not referring to the observance of pedantic niceties (which is by no means to disparage good grammar and spelling), but simply to respect for clarity, accuracy and precision. If you split an infinitive, or fail to use the subjunctive where it is appropriate, you may offend the purist, but the lapse is unlikely to obscure your meaning. But careless syntax and punctuation may well do so, and there are several common practices in the use of words which certainly will, and which impair the versatility and subtlety of the language. In general, these practices involve the use of a word or expression that is vague, misleading, inaccurate, ambiguous, pretentious, pompous, woolly, or outright wrong, in place of one that is accurate, straightforward, clear and precise.

Such practices are incompatible with intellectual rigour, and are likely to lead both to sloppy thinking and hence erroneous conclusions, and to faulty communication and hence mistaken action. They may arise from a misguided attempt at stylistic effect, or from a conscious or unconscious effort to disguise substantive shortcomings (imprecision, shallowness, faulty reasoning, weak argument, etc.), or simply from ignorance or -- regrettably often -- laziness.

To help you avoid such mistakes, some examples follow. Do not, however, take a caution about the use of a word or expression as prohibiting its use altogether. Most of those mentioned below can be used quite legitimately in the appropriate sense and context.

### Misused Words

There are certain words which are often, some of the almost invariably, misused. (It is a particularly common mistake to try to achieve a more impressive effect by substituting for a short, correct word a longer word which in fact means something different: as examples, see *anticipate*, *methodology* and *simplistic*, below.)

*Affirmative* is not synonymous with "positive" (as it is commonly used in, for example, "affirmative action program"). It merely connotes agreement, support or acceptance, as in "we hope for a affirmative response to our request".

*Anticipate* is not synonymous with "expect". It implies not merely expectation, but some kind of preparation or other action related to the event expected. For example, "The Director of Planning prepared his arguments carefully to anticipate likely objections to his proposal".

*Cohort* was originally a Roman army unit and now means a group of allies, supporters or subordinates, not a companion or colleague.

*Comparatively* (and *relatively*) necessarily implies a comparison with something; use it accordingly.

*Comprise* means "include" or "be made up of". Canada comprises -- not "is comprised of" -- ten provinces and two territories.

*Ecology* has become one of the most frequently used words in the planner's (and others') vocabulary, and this is welcome; but it is quite widely misused to equate with "ecosystem" or "natural environment": "we want to keep damage to the local ecology to a minimum". Ecology, properly, is a science.

*Enormity* does not mean "enormous scale" or "vastness" in a general sense, but applies specifically to the magnitude or horror of crimes, disasters and the like. To refer to the "enormity" of a building may be justifiable aesthetic criticism, but that is probably not what you intend.

*Former*, *latter* are used correctly to distinguish between items only when there are just two of them; when there are more than two, use "first" and "last".

*Hopefully* does not mean "with luck", "all being well", or "it is to be hoped that". "Hopefully, I will be home for dinner" means "I will be home hoping to get some dinner", not "I hope to be home for dinner". (I know that this is one of the lost causes, but I'll go down fighting.)

*Lifestyle* (life style, life-style) is a useful term to apply to the characteristic mode of living of a particular person or group, but should not be confused with "culture" or "way of life". "Lifestyle" is about whether you use a 4x4, a Saab or a Honda Civic for transportation; "culture" is about whether you use a car, a bullock cart, or your feet.

*Literally* is often used as if it were synonymous with "metaphorically", which is just what it isn't. "He literally went through the roof" means that he actually and physically went through the roof.

*Major* means, strictly speaking, "greater" (as *minor* means "smaller" or "lesser"). Even if a rather broader use is now generally accepted, the present tendency to describe as "major" anything that isn't manifestly trivial is certainly going too far. Use it with some discrimination, and not where everyday words like "large" or "important" would be appropriate. "Very major", "more major", "most major", etc., are nonsense.

*Majority* means "greater number" (as *minority* means "lesser number"). It does not mean either "greater part" or "great many".

*Methodology* is not synonymous with "method". Don't refer to the "methodology" you used to do something if you just mean the way you did it.

*Minor, minority*: see "major", "majority".

*Parameter(s)* is commonly used (probably by confusion with "perimeter") as if it meant something like "general form" or "outline", though often it is not at all clear what it is intended to mean. What it actually does mean is, roughly, a constant, in scientific or mathematical terminology.

*Relatively*: see *Comparatively*.

*Simplistic* is not synonymous with "simple"; it means "oversimplified to the point of being erroneous or misleading".

*Synonymous* is correctly used only of a word or term having the same meaning as another. It does not have the general sense of "the same as" or "equivalent to".

**Thankfully** means "gratefully", not "fortunately". (See "hopefully", above.)

**Viable** does not mean "practical", "sound", "feasible", "desirable", "valuable", "sensible", "valid", "acceptable" or any of the other dozen or so words for which it is commonly substituted. In its original biological sense, it means "capable of maintaining life", and by extension, "capable of being self-sustaining" in an economic or similar sense. "With a start-up grant of \$100,000, Industry X would probably be viable" is an acceptable use of the word. "To give Industry X a grant of \$100,000 would be a viable decision" is not.

**Vibrant** means "vibrating" or "quivering". A vibrant city is presumably one experiencing an earthquake

### Confusion of Words

There are many pairs and groups of words, in most cases (but not all) sounding or looking rather alike, which are often confused with each other or used as if they were interchangeable. Unless you are quite sure which is which, consult the dictionary before using one of them.

Adapt / adopt  
Affect / effect  
Appraise / apprise  
Alternate / alternative  
Capital / capitol  
Colleague / companion / compatriot  
Complement(ary) / compliment(ary)  
Compose / comprise / constitute  
Council / counsel / consul  
Decimate / devastate  
Definite / definitive  
Defuse / diffuse  
Discreet / discrete  
Ensure / insure  
Fewer / less  
Fortunate / fortuitous  
Imply / infer  
Intercede / interfere / intervene  
Militate / mitigate  
Onset / outset  
Principal / principle  
Precede / proceed  
Regrettably / regretfully  
Reluctant / reticent  
Substantial / substantive

Vogue Words

Vogue words (and expressions) are those that happen to be currently fashionable. Often they are words which originally had specialised technical meanings, like "viable" and "interface". Sometimes the first use of such a word in a new or broader sense is colourful, effective and genuinely useful, but it quickly becomes tedious and merely reveals poverty of both imagination and vocabulary on the part of the writer (or speaker). Vogue words are usually, in fact, employed to replace perfectly adequate "standard" words (e.g. "impact" for "effect", "escalate" for "grow" or "rise") and are often altogether misused (e.g. "vibrant" for "vital" or "lively"). Be very cautious about using vogue words. Recent and current examples, in addition to those mentioned, include:

Basically  
Bottom line  
Challenge  
Dialogue  
In terms of . . .  
Learning curve  
Meaningful  
Parameter  
Posture\*  
Problematic  
Relevant  
Resonance  
Strategy, strategic  
Thrust  
Time frame, time line  
Vision

\* The press once recorded the use of the following sentence in a speech by a minister of the Crown: "Our fiscal posture will remain selectively stimulative." This may convey some sort of meaning to an economist, but it is an excellent example of the use of words to obscure ideas (or the lack of them) rather than transmit them.