

## Work Term Report Manual

University of New Brunswick

Saint John Campus

Co-operative Education Program

Faculty of Business

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## **I. Introduction**

Writing a work term report (WTR) is an exciting opportunity for a university student to learn to communicate effectively in a business setting. Developing and practicing this skill will assist students with future academic and workplace requirements.

This Manual was written to assist Co-op students writing their three (3) Work Term Reports that are required for each work term. Students should refer to the Co-op Policies and Procedures for additional details and requirements regarding their Work Term Report – this can be found on the Co-op website.

There are two types of WTR's, as defined by the Co-op Program:

1. The Problem Solving / Opportunity Investigation WTR, and
2. The Experiential/Career Planning WTR.

Students may choose to complete the second type of WTR only once during their Co-op experience and only during their third work term.

Early in the work term students will submit a Proposal to the WTR Evaluator for approval of the proposed subject or topic of their final WTR. The Proposal will outline what will be completed by the student during the work term to prepare their Final WTR.

Students should become familiar with the requirements for the final WTR by reviewing the additional information provided in this manual including the appendices, prior to selecting their topic. Student must ensure that the topic or subject will allow them to demonstrate their problem solving, opportunity investigation, or career planning skills.

The proposal deadline will be provided by the Co-op office. Additional information regarding the Proposal is outlined in Appendix A and B.

Once the Proposal is approved the student should commence work on the research and analysis that will be required in order to complete their Final Work Term Report. The WTR deadline will be provided by the Co-op office. Additional information regarding the format and content of the Final WTR is included in Appendix C and D.

Confidentiality may be of utmost concern to the employer and is always of the utmost concern to the Co-op office. Consequently, your supervisor must sign your Proposal to insure that he or she endorses your topic. Confidential information about the company may be deleted from the Evaluator's copy of the WTR, as long as the report can be reasonably evaluated without this information. Only the Co-op Team have access to the WTRs, and their content will be kept confidential. The WTR is considered the property of your employer and should be returned to the employer once graded.

The WTR Evaluator will read and evaluate the Final WTR and complete an evaluation form which will be given to the Co-op office to be copied to the student. (see Appendix G) Students should ensure that the Final WTR agrees to the WTR Proposal submitted.

This Manual will provide a format for the two types of WTR Proposals, the format for the Final WTR(s), information regarding each type of WTR, a sample transmittal letter, the evaluation form used for the Final WTR, tips for WTR writers, and resources available to support students throughout the process.

## **II. Type 1: Problem Solving / Opportunity Investigation**

### **i. Work Term Report Proposal: Selecting a problem or opportunity**

To start the process the student must identify a Problem or Opportunity that exists at the employer's workplace to use as the subject of their Work Term Report (WTR).

Students are often hired by Co-op employers to complete certain projects or to fill specific roles. The work term will be a great experience for the student and provide value for the employer – however, it may not provide a suitable problem or opportunity to address in a WTR.

Ideally, the employer will have considered a WTR topic that meets the requirements of the WTR and is of interest to the student however, this will not always be the case. In some cases the student will need to initiate, investigate and propose a topic to their employer. The Co-op WTR Evaluator may be of assistance to the student and employer in the selection of a topic.

Students should review the format for the final WTR in Appendix C to ensure that they understand the problem solving / opportunity investigation process that is to be used to complete the report and the information that needs to be presented.

The student should start the search for a subject “close to home”: are there aspects of the job he or she has been assigned that have room for improvement? One should not be afraid to consider a subject because it seems too simple. For example, do problems with mail service in the office stem from the lack of any procedures for sending and receiving mail? Would improving mail services increase office efficiency in a way that would make the office more effective? How do others react to the question about the existing system and the suggestion to improve it? Does the supervisor see it as a worthwhile project? If the problem or opportunity identified provides enough substance to complete the WTR in the format presented then the proposal will be approved.

During the search for a problem or opportunity students should consider existing staff as a resource of ideas. Students could initiate a “brainstorming” session with their supervisor and co-workers to gather ideas. To initiate the discussion students should note that some people brainstorm better if they focus their thoughts by using specific methods. For example, the student might try asking a question about a particular subject. If the employer is considering providing children’s daycare services for employees, several questions might come to mind. What are the tangible benefits of providing daycare for this particular company? Intangible benefits? What is the most effective method to ensure that benefits meet or exceed costs?

Some students may find a subject emerges from making comparisons among differences noted in the workplace. For example, one shift supervisor schedules employees differently from another. Will a comparison reveal which method is best, why both methods are valid, or why a third method is best?

Sometimes, a subject may be so obvious that it is overlooked. When a student arrives at a new position, a problem or opportunity might already be a source of discussion, with many suggestions put forward but with no research to determine if any might work. The student may choose to study the feasibility of these suggestions and some ideas of their own.

Perhaps identifying key problems with one current system and determining that there are affordable products on the market which may offer more solutions is manageable as a report subject. The student writing this report may not solve the problem, but he or she has moved discussion of the problem and the feasibility of a solution towards a resolution.

After much discussion and consideration, a problem or opportunity will emerge as the best one to provide the student with the opportunity to prepare a work term report that will include research, analysis, alternatives and a final recommendation(s), while also providing the employer with a valuable report. The Student will prepare the Work Term Report Proposal, have it approved and signed by their supervisor, and submit it to the WTR Evaluator for approval using the format shown in Appendix A. The WTR Evaluator will need enough information in the Proposal to

assess whether this subject will provide enough scope for a successful WTR. The Proposal is expected to be 2-4 pages in length.

The WTR Proposal will provide a clear plan of action that will allow the student's research to begin in earnest. The sooner the proposal is submitted and approved, the more time the student has to complete the report.

## **ii. Additional Considerations- Scope, Limitations and Confidentiality**

Before finalizing the subject of the WTR the student should consider the scope and possible limitations of the subject. The scope of the WTR is the range of business activity that the report proposes to address. If the scope of this subject is too broad to be adequately addressed in the timeframe being considered then the scope of the subject and WTR must be narrowed.

Similarly, if the subject has been given too narrow a scope there may be limitations that will affect the WTR. Limitations are the conditions which prevent exploration of relevant avenues of research. Limitations do not require the student to drop the subject however they should be considered and addressed. The timeframe for all students is the four-month work term and as such is an overriding limitation and should not be identified in the report. While completing the WTR students may experience limitations such as unforeseen delays in receiving information or incomplete records and these should be identified in the final report.

## **iii. The Final Work Term Report**

The Work Term Reports are to be presented in the Format outlined in Appendix C.

The format is based on a process that is similar to the case study method used in many business courses. The report will include an Introduction, Research and Analysis, Evaluation of Alternatives, Recommendations and a Conclusion.

The report will be supported by information contained in appendices, and will be referenced to source documents in a bibliography.

The WTR will be accompanied by a letter of transmittal, cover page, table of contents and an executive summary. Additional information regarding the contents of the various sections of the report is included in Appendix C.

### **III. Type 2: Experiential/Career Planning**

#### **i. Work Term Report Proposal - Purpose and Scope**

Experiential Learning is the process of making meaning from direct experience.

Aristotle once said, "For the things we have to learn before we can do them, we learn by doing them."

The purpose of completing this report is to help you to clarify your goals for future work terms, academic terms, and career plans. Your plans will be affected by your experiences with your current and past co-op placement(s). This is the reason why this report is only an option in your third and final work term. Your report will share with the reader your reflections on your development as a student and as a business professional, and how this may have affected your career plans.

This report is not to be a journal outlining your work term activities but rather a report about what you can take away from your work term experience(s).

Work Term Report Proposals are to be presented in the format outlined in Appendix B.

#### **ii. The Final Work Term Report**

The Final Work Term Report will include an introduction, research and analysis, Reflections on your development as a student, reflections on your development as a professional, making linkages between your BBA experiences and your work term experiences, looking forward to your future, and a conclusion.

The report will be supported by information contained in appendices, and will be referenced to source documents in a bibliography. The WTR will be accompanied by a letter of transmittal, cover page, table of contents and an executive summary.

Your supervisor must sign your WTR to ensure that he or she has read your report and approves of the release of the information. Confidential information about the company may be deleted if required. Additional information regarding the contents of the various sections of the report is included in Appendix D.

## Appendix A

### **FORMAT FOR WORK TERM REPORT PROPOSALS**

#### **TYPE 1: Problem Solving/ Opportunity Investigation**

**Front Material:** Transmittal Letter to WTR Evaluator (see Appendix E)

The Proposal should include the same headings and sections as are expected to be included in the Final Work Term Report (see Appendix C)

#### **Introduction**

Briefly describe the current employer's workplace, the student's position description, and the problem or opportunity that is to be the subject of the Work Term Report.

A brief historical background should follow, tracing the source of the problem or opportunity and identifying key players and issues to be considered when developing alternatives from which to select recommendations. The report's scope and limitations should be described.

#### **Research and Analysis**

The methods of research should be described and a rationale for the choice of methods provided. Will colleagues be interviewed, reports read, data collected, scholarly research consulted? If so, why? If not, why not?

Any analysis that will be completed should be described to identify its value in addressing the situation.

#### **Alternatives**

If the employer has proposed alternatives to be investigated or the student has already identified the alternatives they should be briefly described. Whether a cost/benefit analysis can be completed should be identified. The cost/benefit analysis may consider non-financial factors,

such as staff time, space, supplies, training etc. These may be identified even though cost quantification may not be possible.

## **Recommendations**

Students should identify that they will evaluate the alternatives to make a recommendation that will provide benefit to the employer. This will allow the student to discuss the potential significance of the WTR to the employer. Will a successful project result in an increase of effectiveness and efficiency? How? What will be indicators of these results? Can they be represented in dollars, or in some other measurable form? Will a service or product be improved? How? Is the expected gain worth the cost?

## **Appendix B**

### **FORMAT FOR WORK TERM REPORT PROPOSALS**

#### **TYPE 2: Experiential / Career Planning (for third work term students only)**

**Front Material:** Transmittal Letter to WTR Evaluator (see Appendix E)

The Proposal should include the same headings and sections as are expected to be included in the Final Work Term Report (see Appendix D)

#### **Introduction**

Briefly describe the current employer's workplace, the student's position description, and the problem or opportunity that is to be the subject of the Work Term Report.

Briefly describe your career plans at this time and how the co-op work experiences have influenced your plans at this point and how the current work term may influence them further.

Identify research that will be undertaken to investigate the career path(s) that you have chosen, or are considering after your undergraduate degree. Choices regarding potential career paths may include additional education, professional certifications, industry, locations, size of company, public or private or non-profit organizations, etc.

#### **Research and Analysis**

Identify research that will be undertaken to investigate the career path(s) that you have chosen, or are considering after your undergraduate degree.

Identify at least one mentor from within the current employer organization who you will interview to discuss your possible career path(s), alternative choices, and their career experience.

The methods of research should be described and a rationale for the choice of methods provided. Will colleagues be interviewed, reports be read, information collected, scholarly research or professional publications consulted? If so, why? If not, why not?

## **Reflection on your development as a Student:**

Briefly explain how your co-operative education experience(s) influenced how you perceive yourself as a BBA student at this point in time. Identify any characteristics you will consider and reflect on regarding the impact of your current work term.

## **Reflection on your development as a Professional**

Briefly explain how your co-op experience(s) have influenced your development as a business professional and what type of development you expect to occur and be addressed during the current work term.

## **Linking your BBA experiences and your Work Term experiences**

Briefly discuss how your prior learning has helped prepare you for your work terms and similarly how the work terms have helped prepare you for your academic experiences.

## **Looking Forward to your Future**

Based on your experiences to date, both academically and with your work terms, briefly describe how these experiences have impacted and influenced your career choices and plans. Identify any questions that remain that will be investigated during this completion of the WTR.

## Appendix C

### **FINAL WORK TERM REPORT FORMAT**

#### **TYPE 1: Problem Solving/Opportunity Investigation**

**Front Material:** compose this section after writing the report

- Letter of transmittal – this letter accompanies your report to introduce the report and your topic to the reader. (see Appendix E for a sample)
- Cover page (include the following statement and signature from the employer: As the Co-op Student's Supervisor I have read and approve of the release of the WTR as presented to the Co-op Team for evaluation \_\_\_\_\_Name, \_\_\_\_\_Signature).
- Table of Contents, and a Table of Figures or Graphs if appropriate
- Executive Summary – this will be a one or two page summary of your report. It will briefly introduce the problem or opportunity, the most relevant research and analysis completed, the alternatives considered, and the recommended action. The information may be presented in bulleted, point-form notes. Cost and benefits should be stated when possible. If the executive summary is well written it will encourage the reader to read the complete report.

**Introduction:** written for the WTR evaluator and your employer

- Identify your work term organization: name, function, location
- Identify your position within the organization
- Provide a brief historical background leading to your problem/opportunity
- Identify the problem/opportunity in enough detail to allow the reader to understand the situation. Demonstrate that you have a clear perception of the problem.

- Describe the scope of the report: the limits of what you are examining
- Identify limitations that you have experienced: time frame, access to information, conditions affecting your research
- Identify research undertaken: primary research (interviews, company records, questionnaires etc.) Secondary research (articles, books, statistics, theory, etc.)
- State of the purpose of your report

**Research and Analysis:** the main part of the report, often organized under sub-headings

- Findings from any research undertaken and additional analysis completed. Discuss the appropriateness of the research and analysis completed to support a recommendation.
- Ensure that the observations or conclusions made from the research and analysis are of high quality
- Ensure objectivity, accuracy, and thoroughness in completing the research and analysis
- Identify information about existing conditions in the organization that are relevant to your topic
- Identify information about programs or actions under consideration by the organization to deal with the topic or situation
- Identify any Theories or statistics that relate to these conditions, programs or actions in the company. This may be found in various sources. Recording the source of each piece of information is important. All research notes should be written in the student's own words to avoid plagiarism. Direct quotations or statements taken from a secondary source- must be in quotations.
- Present information in tables and graphs (which are placed in appendices) and referenced in the body of the report as relevant to the topic

- Include all research and analysis that was outlined in the WTR Proposal, or explain why it is not included

## **Evaluation of Alternatives:**

- Describe at least three (3) alternative courses of action the company could consider
- Discuss the Advantages and disadvantages of each alternative
- Provide cost/benefit analysis of alternatives as appropriate
- End with the disadvantages of the alternatives you have not chosen to recommend
- End with the advantages of the alternative you have chosen to recommend

## **Recommendations**

- Refer back to the introduction and your statement of the problem/opportunity
- Make connections to all sections of your report (research, analysis, alternatives) that will lead the reader to the same overall recommendation that you are making.
- This section will explain how the problem will be solved, or opportunity seized why the recommendation's disadvantages can be disregarded, and how the recommendation's benefits will exceed its costs.
- Make more than one recommendation where appropriate for completeness
- The recommendations do not necessarily have to agree with what the employer will eventually decide. The recommendations must be based on the research and analysis completed by the student and presented in the WTR.
- Provide procedures for implementation of the recommendation, if possible

## **Conclusion to the Report**

- Discuss the Significance of the of this report and its recommendation to the employer:  
how it will help the organization
- Include how the significance of the report can be measured
- Identify possible topics or issues for further investigation of the topic (if appropriate)

## **Appendices:**

- Only material that is used in the body of the report should be included in an Appendix and referenced accordingly
- May include Tables, Graphs, figures, data, background information, company data, interviews completed, and questionnaires. Often information can best be presented in graph or table format
- All Appendices are to be Titled at the top, and the source provided at the bottom
- References to the Appendix are made in the report at the end of the appropriate sentence (ie. for example, see Appendix xx)

## **Bibliography:**

- Provide references for all sources of information used in the report. Additional information on referencing is provided in the Tips for WTR Writers (Appendix F)

## Appendix D

### **FINAL WORK TERM REPORT FORMAT**

#### **TYPE 2: Experiential Career Planning (for third work term students only)**

**Front Material:** compose this section after writing the report

- Letter of transmittal – this letter accompanies your report to introduce the report and your topic to the reader. (see Appendix E for a sample)
- Cover page (to include a statement and signature from the employer that they have read and approve of the report being released)
- Table of Contents, and a Table of Figures or Graphs if appropriate
- Executive Summary – this will be a one or two page summary of your report. It will briefly introduce your initial career plans, the most relevant research and analysis completed, the alternatives considered, and the chosen career path. The information may be presented in bulleted, point-form notes. If the executive summary is well written it will encourage the reader to read the complete report.

**Introduction:** written for the WTR evaluator and your employer

- Identify your current and past work term organization: name, function, location
- Identify your position(s) within those organizations. Note the size, nature, and governance structure of the organizations, products & services provided and markets served, where in the organization your area/department fits, its role, and responsibilities, and your own role & responsibilities within the department and in the organizations
- Provide a brief background regarding your current situation (Major, year of study, interests, etc.)

- Your career choices and goals and reasons for accepting your current position
- Describe the scope of the report: the limits of what you are investigating
- Identify limitations that you have experienced: time frame, access to information, conditions affecting your research
- Identify research undertaken: primary research (interviews, company records, questionnaires etc.) Secondary research (articles, books, statistics, theory, etc.)
- State of the purpose of your report

## **Research and Analysis**

- Describe the career path that you are considering taking after completion of your undergraduate degree. Outline the steps or qualifications required to advance. Provide supporting documentation of your research in the Appendices.
- Identify any changes that may be required as you plan your final courses.
- Identify known advantages or disadvantages related to your career choices. Identify which of these are more critical to you in your decision making.
- Interview at least one mentor from within your current co-op employer in order to learn about their career path. Identify someone who is currently working in a senior level position where you strive to be. In your discussions, determine how they arrived at their current position, how long they have been working, job changes during their career, promotions attained and key factors contributing to them, how their nature of work responsibilities have evolved over time, significant factors they see as important in determining success. Attach a printed copy of your interview(s) as an appendix to your report.
- Compare the information provided by your mentor to your own research and planned career path. Analyze how your perceptions relate to the real world experience of your

mentor and your research. How does your mentor's experience impact your own career planning? Describe any unexpected issues in career development discovered as a result of the interview and research.

- Identify any changes to your own career plans as a result of this research? Discuss the extent of these changes.

## **Reflection on your development as a Student:**

- Explain how your co-operative education experience(s) influenced how you perceive yourself as a BBA student
- How did the experience(s) impact your future choices regarding your studies?
- How did the experience(s) affect your work habits, confidence, goals, outlook, etc.?
- Identify any additional skills you wish to develop further to assist your studies

## **Reflection on your development as a Professional**

- How did your co-op experience(s) influence your development as a business professional?
- What did you learn about workplace etiquette, issues, culture, language, work ethic, management styles, organizational policies and procedures?
- Describe what you have learned about yourself as a professional while working in a business role.
- Identify any professional challenges encountered in the workplace, and how they were overcome
- Identify any additional skills you wish to develop further to assist your professional development

## **Linking your BBA experiences and your Work Term experiences**

- Discuss how your prior learning helped prepare you for your work terms

- Describe how you were able to use skills learned in the classroom during your work terms
- Identify which classes were most useful in helping you prepare and perform in the workplace
- Identify which co-op professional development seminars benefitted you in your various roles
- What specific skills did you use in the workplace?
- How will this work experience benefit you with your future studies?
- Identify any training you completed while on work term that will help you with your academic studies

## **Looking Forward to your Future**

- Describe how each of your co-op work experiences impacted and influenced your career plans
- Identify if the experiences confirmed what you were originally planning or if it changed your plans

## **Conclusion**

Include a brief summary that will tie the report together from introduction to completion of the discussion of your future.

## Appendix E

### SAMPLE TRANSMITTAL LETTER

Your name and mailing information

Date

Work Term Report Evaluator (their name if known)  
Co-operative Education Program, Faculty of Business  
University of New Brunswick  
P.O. Box 5050, 100 Tucker Park Road  
Saint John, New Brunswick E2L 4L5

Dear WTR Evaluator (or Mr. Smith):

RE: Work Term Report for Evaluation

The letter of transmittal must be written in a standard, business- letter format. The first paragraph quickly introduces who you are and why you have sent this report to the receiver, your evaluator.

The second paragraph explains your work term employment insofar as it is relevant to the report or its production. Any unique circumstances which were not appropriate for the contents of the report may be explained here.

The final paragraph is a goodwill opportunity. You also provide information about how you may be contacted.

Sincerely,

Your name

Co-op Student

Faculty of Business, UNB Saint John

## Appendix F

### Tips for Students preparing a Work Term Report

- The Co-op Program recommends that each student have their report reviewed by the Writing Center on campus prior to submission.
- Presentation – readers judge the reliability of a report on its presentation. A well-researched, well-argued report may fail if the reader loses interest in the report due to its poor presentation. The report must appear professional and “read” in a professional manner.
- Writing Style and clarity - Are the sections of the report well organized? Is each section introduced from the preceding sections with its significance to the argument made clear? Is that significance supported through the development of the section? Does the section conclude with its main point, and is that point linked to the next section? The writer must insure that the reader never feels lost, never feels that the discussion is rambling.

Excess material should be removed. Is the writer’s manner of expression wordy? Clarity is of primary importance.

- Writing for the Audience - Are choices in tone, language and figures of speech appropriate for the audience, the reader? The audience is anyone who may have reason to read the report now or in the future, including your supervisor and the Work Term Evaluator.
- Use of technical terminology- choices must be based on the knowledge of the reader.
- Grammar and spelling- Grammar, spelling, sentence structure and paragraph structure need to be considered and reviewed in order to ensure that a professional report is the final result. Use caution when depending on computerized spell check and grammar check features as they do not always provide an accurate check of your message. The report should be free from errors.

- **Form and Length** - The contents of a report should dictate its form and length. If a report can be easily written in five pages with few sections, it should be written that way. If, in order to simplify complex ideas, a report is better written as twenty pages with several sections, each containing several subsections, this is the appropriate form. The writer is in the best position to determine a report's form and length, but advice could be sought from a supervisor, the Evaluator, the Writing Lab or all three.
- **Scheduling**- The best way to prevent feeling overwhelmed by a writing project is to create a schedule at the beginning of the project, with target dates for completing each step. This schedule may be re-evaluated and changed. If changes are being made because the writer is procrastinating, the schedule is useless. In this case, the writer should re-assess his or her commitment to the project and re-focus on the report's subject and purpose.
- **Extensions** – refer to **Co-op Policies and Procedures** for details regarding extensions.

## Appendix G

### Evaluation form used by WTR Evaluator

reference attached evaluation

## Appendix H

### Resources for Students completing a WTR

UNB Saint John Writing Center

UNB Saint John Math Center

UNB Saint John Student Services

UNB Saint John Library Services

UNB Saint John Bookstore

UNB Saint John CO-OP Office Staff

UNB Saint John Faculty of the Faculty of Business

Textbook and course materials

Let's Write, produced by UNB Saint John Faculty of Nursing, available at bookstore

White's Element of Style

Harbrace College Handbook by Hodges and Whitten – report writing instructions

Internet websites for professional designations, associations, corporation, organizations, employment information, and job search information, etc.