

Learning Assessment Guide

Unit Standard 9685 – Version 5

Write an analytical report

Level 5 – 5 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

- sections to complete
- report checklists
- workplace manager verification forms (checklist, authenticity, and unit understanding and application).

The tasks in this assessment are designed to show your assessor that you can:

- select and organise information
- write the introductory section(s)
- write the body of the report
- write a summary
- publish the report according to a specified format.

Unit standard 9685 is about being able to plan, write and publish an analytical report. The reports required for this assessment should be completed as part of your normal work-based responsibilities.

Given this is a level 5 unit standard, you will be asked to submit evidence of three analytical reports. They are each to be 1500 words or more, and contain a combination of text and data other than text (tables, graphs, diagrams or other).

Assessment Task One

Background to Analytical Report Writing

This task requires you to provide a background to your involvement with writing analytical reports.

1. Give the definition of an analytical report. Ensure your definition is clear about how it differs from other reports (such as a project report).

2. Give brief details of your work role and responsibilities.

3. Provide a list of analytical reports you have written.

Assessment Task Two

Background to Analytical Report One

4. Title of Analytical Report One.

5. Give the topic of Analytical Report One.

6. Briefly describe how Analytical Report One links to your work role and responsibilities.

7. Briefly describe the purpose of the Analytical Report One.

8. Briefly describe the intended audience of Analytical Report One.

9. Briefly describe what you plan Analytical Report One will achieve (the outcomes). List them.

10. Describe how Analytical Report One will be formatted for presentation/publication (state and describe the standard organisation format you will be using).

11. Give details on layout for the specified format you will use, for example, a standard format might include:

- title
- introduction (purpose, scope, and background)
- procedures (methods)
- results
- conclusions (discussion and recommendations)
- acknowledgement
- references
- appendices
- abstract or executive summary.

12. List what you will need to research or collect from other sources. This may include statistics, tables, graphs, diagrams or text. For each, state the method you would use to collect that information (must be linked to the purpose of the report).

Information /research to collect	Method you will use to collect the information

Assessment Task Three

Select and organise the information for Analytical Report One

This task requires you to plan your first analytical report.

13. State why this report is needed (linking purpose and audience, see Numbers 7 and 8).

Assessment Task Four

Write and publish Analytical Report One

This task requires you to actually write and publish the report.

15. The following is a checklist for you to use to ensure you complete all tasks being assessed. Once you have completed all listed, tick them on the checklist, and have your manager check your report against all points.

✓	Analytical Report One - Self Checklist
	Introductory section written
	1. Purpose is identified
	2. Scope of the report is given
	3. Method of gathering information is explained
	4. Method of gathering information is consistent with the scope of the report (terms of reference)
	Body of the report written
	5. Results are presented in a form to match the data or purpose of the report
	6. Results are presented in a form to suit the audience
	7. Data is presented (text, tables, graphs, diagrams or other) State what form(s) are included: _____ _____
	8. Results are presented without bias or opinion
	9. Data are analysed, consistent with the purpose and scope
	10. Any recommendations are consistent with the purpose, scope, results and conclusions
	11. Conclusions and/or inferences drawn are consistent with the results
	12. The report follows through in a logical manner
	Summary of the report is written
	13. Purpose identified
	14. Methods identified
	15. Outcomes identified
	16. Word length is suitable for the purpose and audience
	The report is published
	17. All external material used is correctly referenced
	18. Any additional information used in the report is incorporated appropriately
	19. Style format is consistent (including ALL headings, numbering system, indentations, figures and tables, type style and size)
	20. The language is appropriate for the audience specified (including tone register, vocabulary, grammar and syntax)

16. Attach your report to this assessment.

17. Your manager is to check your report against each point in the checklist (Number 15) and is to complete the following verification form.

Manager Report Verification Form - Analytical Report One

Report Title _____

The manager verifies that :

- the report is the learner's own work
- the learner completed it without assistance in the process or writing (although assistance in regards to information or research may have been given)
- it is a balanced, unbiased presentation that meets the needs of the organisation
- it serves the purpose for which it was intended
- the report is based on a standard organisational format
- the learner has adequately and correctly covered all points as listed in the Checklist at Number 15 (manager has checked each point).

Name:

Date:

Signature:

Comments (if needed):

Assessment Task Five

Background to Analytical Report Two

18. Title of Analytical Report Two.

19. Give the topic of Analytical Report Two.

20. Briefly describe how Analytical Report Two links to your work role and responsibilities.

21. Briefly describe the purpose of the Analytical Report Two.

22. Briefly describe the intended audience of Analytical Report Two.

23. Briefly describe what you plan Analytical Report Two will achieve (the outcomes). List them.

24. Describe how Analytical Report Two will be formatted for presentation/publication (state and describe the standard organisation format you will be using).

25. Give details on layout for the specified format you will use, for example, a standard format might include:

- title
- introduction (purpose, scope, and background)
- procedures (methods)
- results
- conclusions (discussion and recommendations)
- acknowledgement
- references
- appendices
- abstract or executive summary.

26. List what you will need to research or collect from other sources. This may include statistics, tables, graphs, diagrams or text. For each, state the method you would use to collect that information (must be linked to the purpose of the report).

Information /research to collect	Method you will use to collect the information

Assessment Task Six

Select and organise the information for Analytical Report Two

This task requires you to plan your second analytical report.

27. State why this report is needed (linking purpose and audience, see Numbers 21 and 22).

Assessment Task Seven

Write and publish Analytical Report Two

This task requires you to actually write and publish the report.

29. The following is a checklist for you to use to ensure you complete all tasks being assessed. Once you have completed all listed, tick them on the checklist, and have your manager check your report against all points.

✓	Analytical Report Two - Self Checklist
	Introductory section written
	1. Purpose is identified
	2. Scope of the report is given
	3. Method of gathering information is explained
	4. Method of gathering information is consistent with the scope of the report (terms of reference)
	Body of the report written
	5. Results are presented in a form to match the data or purpose of the report
	6. Results are presented in a form to suit the audience
	7. Data is presented (text, tables, graphs, diagrams or other) State what form(s) are included: _____ _____
	8. Results are presented without bias or opinion
	9. Data are analysed, consistent with the purpose and scope
	10. Any recommendations are consistent with the purpose, scope, results and conclusions
	11. Conclusions and/or inferences drawn are consistent with the results
	12. The report follows through in a logical manner
	Summary of the report is written
	13. Purpose identified
	14. Methods identified
	15. Outcomes identified
	16. Word length is suitable for the purpose and audience
	The report is published
	17. All external material used is correctly referenced
	18. Any additional information used in the report is incorporated appropriately
	19. Style format is consistent (including ALL headings, numbering system, indentations, figures and tables, type style and size)
	20. The language is appropriate for the audience specified (including tone register, vocabulary, grammar and syntax)

30. Attach your report to this assessment.

31. Your manager is to check your report against each point in the checklist (Number 29) and is to complete the following verification form.

Manager Report Verification Form - Analytical Report Two

Report Title _____

The manager verifies that :

- the report is the learner's own work
- the learner completed it without assistance in the process or writing (although assistance in regards to information or research may have been given)
- it is a balanced, unbiased presentation that meets the needs of the organisation
- it serves the purpose for which it was intended
- the report is based on a standard organisational format
- the learner has adequately and correctly covered all points as listed in the Checklist at Number 29 (manager has checked each point).

Name:

Date:

Signature:

Comments (if needed):

Assessment Task Eight

Background to Analytical Report Three

32. Title of Analytical Report Three.

33. Give the topic of Analytical Report Three.

34. Briefly describe how Analytical Report Three links to your work role and responsibilities.

35. Briefly describe the purpose of the Analytical Report Three.

36. Briefly describe the intended audience of Analytical Report Three.

37. Briefly describe what you plan Analytical Report Three will achieve (the outcomes). List them.

38. Describe how Analytical Report Three will be formatted for presentation/publication (state and describe the standard organisation format you will be using).

39. Give details on layout for the specified format you will use, for example, a standard format might include:

- title
- introduction (purpose, scope, and background)
- procedures (methods)
- results
- conclusions (discussion and recommendations)
- acknowledgement
- references
- appendices
- abstract or executive summary.

40. List what you will need to research or collect from other sources. This may include statistics, tables, graphs, diagrams or text. For each, state the method you would use to collect that information (must be linked to the purpose of the report).

Information /research to collect	Method you will use to collect the information

Assessment Task Nine

Select and organise the information for Analytical Report Three

This task requires you to plan your third analytical report.

41. State why this report is needed (linking purpose and audience, see Numbers 35 and 36).

Assessment Task Ten

Write and publish Analytical Report Three

This task requires you to actually write and publish the report.

43. The following is a checklist for you to use to ensure you complete all tasks being assessed. Once you have completed all listed, tick them on the checklist, and have your manager check your report against all points.

✓	Analytical Report Three - Self Checklist
	Introductory section written
	1. Purpose is identified
	2. Scope of the report is given
	3. Method of gathering information is explained
	4. Method of gathering information is consistent with the scope of the report (terms of reference)
	Body of the report written
	5. Results are presented in a form to match the data or purpose of the report
	6. Results are presented in a form to suit the audience
	7. Data is presented (text, tables, graphs, diagrams or other) State what form(s) are included: _____ _____
	8. Results are presented without bias or opinion
	9. Data are analysed, consistent with the purpose and scope
	10. Any recommendations are consistent with the purpose, scope, results and conclusions
	11. Conclusions and/or inferences drawn are consistent with the results
	12. The report follows through in a logical manner
	Summary of the report is written
	13. Purpose identified
	14. Methods identified
	15. Outcomes identified
	16. Word length is suitable for the purpose and audience
	The report is published
	17. All external material used is correctly referenced
	18. Any additional information used in the report is incorporated appropriately
	19. Style format is consistent (including ALL headings, numbering system, indentations, figures and tables, type style and size)
	20. The language is appropriate for the audience specified (including tone register, vocabulary, grammar and syntax)

44. Attach your report to this assessment.

45. Your manager is to check your report against each point in the checklist (Number 43) and is to complete the following verification form.

Manager Report Verification Form - Analytical Report Three

Report Title _____

The manager verifies that :

- the report is the learner's own work
- the learner completed it without assistance in the process or writing (although assistance in regards to information or research may have been given)
- it is a balanced, unbiased presentation that meets the needs of the organisation
- it serves the purpose for which it was intended
- the report is based on a standard organisational format
- the learner has adequately and correctly covered all points as listed in the Checklist at Number 43 (manager has checked each point).

Name:

Date:

Signature:

Comments (if needed):

Assessment Task Eleven

Manager Verification Form – Unit Standard 9685 Version 5 (Manager to complete)

Name of learner:	
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This learner is currently being assessed toward unit standard 9685 – Write an Analytical Report.

Your knowledge of the learner is sought to verify whether or not the learner demonstrates a good understanding and application of the principles involved in this area.

Please complete this form and arrange for it to be passed on to the 8085 assessor.

The learner is able to select and organise information	Yes	No
The learner is able to write the introductory section(s)	Yes	No
The learner is able to write the body of the report	Yes	No
The learner is able to write a summary	Yes	No
The learner publishes the report to the specified standard format	Yes	No

Comments:

Name:		Phone:	
Position:		Date:	
Email:			