STRACHAN TOMLINSON

QUALITY CHECKLIST FOR DOCUMENTS SUPPORTING A PROCESS

Working documents that support a process are often composites of information produced for other purposes, such as published research, literature reviews, policy statements, previously commissioned reports, trend analyses, meeting reports, or official statements.

It is rare that these existing documents can be applied directly. They need to be interpreted and modified, and this involves accurate reading, rational analysis and synthesis, rewriting, and reformatting to ensure that the final product is relevant, accurate, clear, and appropriately formatted, and then reviewed and edited.

Use or customize the following checklist as a detailed guide for writers contracted to produce materials for a process.

Quality Checklist

Relevance: Are contents pertinent to the scope, purpose, and objectives outlined in the PTR and the overall situation?

- ☐ Is the underlying perspective in line with the process overview, that is, scope, purpose, objectives, outputs, outcomes?
- ☐ Is the information directly applicable to the task at hand?
- ☐ Is all relevant information present?
- ☐ Are parts of the document more useful than others? If yes, describe.
- ☐ Does the document fulfill contractual obligations?

Accuracy and Integrity: Are the contents faithful to original sources?

- ☐ Are all sources clearly identified and referenced with Internet links provided where appropriate and available?
- ☐ Are conclusions based on reliable evidence?
- ☐ Are comparisons based on data from compatible sources?
- ☐ Are materials even-handed (that is, not biased toward a particular view of the issues), and are all positions identified and clearly represented?
- ☐ Are authors' personal views presented separately from a disinterested representation of the information?

Essential Documents

- ☐ Are statistical summaries and comparisons based on an understanding of how statistical data is developed and interpreted?
- ☐ Are summaries of concepts and ideas a true reflection of original materials?

Writing Clarity: Can the intended audience read, understand, and (if appropriate) begin to act upon the document the first time it is read?

- ☐ Are scientific or jargon terms appropriate to the intended readers?
- ☐ Are sentences short and to the point?
- ☐ Does the language reflect and enable clear thinking?

☐Have the authors avoided common metaphors and clichés?
☐Is information presented using the minimum number of words, sentences, and paragraphs?
☐Is the language active, crisp, and professional?

Presentation: Is the document formatted to enable participants to read, understand,and apply the information? Does the document:

☐Have a covering page with a name or title, who it is for, when it was written and by whom, and number of the draft?
☐Include a table of contents with corresponding page numbers?
☐Provide an introduction that sets out why the document was developed (its rationale and assumptions), how it is intended to be used, by whom and under what circumstances, methodology (rationale and approach to information gathering), data sources and so on?
☐Have clearly identifiable sections and levels of headings?
☐Conform to the style sheet template requirements provided by the contractor, with consistent visual and electronic formatting throughout?
☐Contain simple illustrations, charts, and graphs where appropriate?
☐Display printed text in a pleasing and artful manner?

Review: Has the document been reviewed and edited by a committee of experts and a professional editor for:
☐Relevance and accuracy?
☐Language and presentation?

Adapted from *Making Questions Work*. San Francisco: Jossey-Bass, 2006. For more information: http://ca.wiley.com/WileyCDA/WileyTitle/productCd-0470182709.html