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7-1-2019

### 02.05: Progress Reports

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#### Recommended Citation

McMurrey, David, "02.05: Progress Reports" (2019). *Open Technical Communication*. 6.  
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## Progress Reports

David McMurrey

### Chapter Objectives

Upon completion of this chapter, readers will be able to do the following:

1. Explain the purpose of a progress report.
2. Navigate and apply the format and structure of a proposal.
3. Explain common components of a progress report.

# Progress Reports

You write a progress report to inform a supervisor, associate, or customer about progress you've made on a project over a certain period of time. The project can be the design, construction, or repair of something, the study or research of a problem or question, or the gathering of information on a technical subject. You write progress reports when it takes well over three or four months to complete a project.

## Functions and Contents of Progress Reports

In the progress report, you explain any or all of the following:

- How much of the work is complete
- What part of the work is currently in progress
- What work remains to be done
- What problems or unexpected things, if any, have arisen
- How the project is going in general

Progress reports have several important functions:

- Reassure recipients that you are making progress, that the project is going smoothly, and that it will be complete by the expected date.
- Provide recipients with a brief look at some of the findings or some of the work of the project.
- Give recipients a chance to evaluate your work on the project and to request changes.
- Give you a chance to discuss problems in the project and thus to forewarn recipients.
- Force you to establish a work schedule so that you'll complete the project on time.
- Project a sense of professionalism to your work and your organization.

## Timing and Format of Progress Reports

In a year-long project, there are customarily three progress reports, one after three, six, and nine months. Depending on the size of the progress report, the length and importance of the project, and the recipient, the progress report can take the following forms:

- Memo—A short, informal report to someone within your organization
- Letter—A short, informal report sent to someone outside your organization
- Formal report—A formal report sent to someone outside your organization

# Organizational Patterns for Progress Reports

The recipient of a progress report wants to see what you've accomplished on the project, what you are working on now, what you plan to work on next, and how the project is going in general. To report this information, you combine two of these organizational strategies: time periods, project tasks, or report topics.

## Time Periods

A progress report usually summarizes work within each of the following:

- Work accomplished in the preceding period(s)
- Work currently being performed
- Work planned for the next period(s)

## Project Tasks

Practically every project breaks down into individual tasks.

Project Tasks: One organizational approach to progress reports.

Project	Individual tasks
Building municipal ball parks on city-owned land	Measuring community interest Locating suitable property Designing the bleachers, fences, etc.
Writing a report	Studying the assignment Selecting a topic Identifying the audience of the report Narrowing the topic Developing a rough outline Gathering information Writing one or more rough drafts Documenting the report Revising and editing the report draft Typing and proofreading the report Putting the report in its final package

## Report Topics

You can also organize your progress report according to the work done on the sections of the final report. In a report project on co-combusting municipal solid waste, you would need information on these topics.

### Topics to be covered in the final report

1. The total amount of MSW produced—locally—nationally
2. The energy potential of MSW, factors affecting its energy potential
3. Costs to modify city utilities in order to change to co-combustion

For each of these topics, you'd explain the work you have done, the work you are currently doing, and the work you have planned.

A progress report is actually a combination of two of these organizational strategies. The following outline excerpts give you an idea of how they can combine.

### Progress Report Outlines

Progress Report A	Progress Report B	Progress Report C
<i>Task 1</i>	<i>Work Completed</i>	<i>Topic 1</i>
Work completed	Task 1	Work completed

Current work	Task 2	Current work
Planned work	Task 3	Planned work
<i>Task 2</i>	<i>Current Work</i>	<i>Topic 2</i>
Work completed	Task 1	Work completed
Current work	Task 2	Current work
Planned work	Task 3	Planned work
<i>Task 3</i>	<i>Future Work</i>	<i>Topic 3</i>
Work completed	Task 1	Work completed
Current work	Task 2	Current work
Planned work	Task 3	Planned work

The following illustration shows an example of the project-tasks approach with subheadings for time periods.

**Brain Drainage Tube Modifications**

During this period, we have continued to work on problems associated with the brine drainage tubes.

**Previous period.** After minor adjustments during a month of operation, the drainage tubes and the counterwasher have performed better but still not completely satisfactorily. The screen sections of these tubes, as you know, are located at variable distances along the height of the washer.

**Current period.** The screen portion of the brine drainage tubes have been moved to within 5 feet of the top of the pack. So far, no change in counterwasher performance has been observed. Production statistics at the end of this month (February) should give us a clearer idea of the effect of this modification.

**Next period.** Depending on the continued performance of the screen in its current position in relation to the top of the pack, we may move the screen to within 3 feet of the top of the pack in the next period of testing. Although the wash ratio was greater with greater screen height, the washing efficiency seems to remain relatively constant; the production vs. compressor KW data for all screen locations so far has seemed to follow the same linear curve.

These two outlines show progress reports organized by project tasks.

Example Outlines

<b>WORK COMPLETED</b>	<b>PRESENT WORK</b>
As of this time, I have completed almost all of the research work and am putting the sections of the final report together. Here is a breakdown of the work that I have done so far.	Right now I am mainly involved in determining just which areas of my report are lacking information. Also, I am

**Development of the Bottle.** In the development section of my report, I have written a technical description of a typical PET soft-drink bottle. It is complete and gives the reader a good idea of what the product should look like and be able to accomplish.

**Favorable Properties.** The section of the report describing the properties of PET is finished. I have chosen four physical properties that many raw materials containers are tested for, and I have shown how PET withstands these tests.

**Manufacturing Processes.** For the section on manufacturing processes, I have done research to help me recommend one particular production method for PET bottles. Here, I have described this chosen method and have explained exactly how a plastic bottle is produced on an assembly line.

**Economics.** I have finished work on half the economics section of this report. So far, I have written an economic comparison of the use of plastic and glass bottles.

continuing my work in locating financial information on PET bottles.

**Manufacturing Processes.** In the manufacturing section, I am currently...

## Other Parts of Progress Reports

In your progress report, you also need the following.

1. an introduction that reviews the purpose and scope of the project
2. a detailed description of your project and its history
3. an overall appraisal of the project to date, which usually acts as the conclusion.

### Introduction

I am now submitting to you a report on the progress that I have made on my research for your company, Ginseng Cola. Immediately following the January 15 acceptance of my firm's bid to study the advantages of bottling your soft-drink product in plastic bottles, I began investigating all areas of the project.

In the following sections of this progress report, you will be informed on the work that I have already accomplished, the work I am now involved in, the work left to do, and finally an overall appraisal of the how the project is going.

Review the details of your project's purpose, scope, and activities. This will aid recipients who are unfamiliar with the project, who do not remember certain details, or who want to doublecheck your approach to the project. The introduction can contain the following:

- Purpose of the project
- Specific objectives of the project
- Scope, or limits, of the project
- Date the project began; date the project is scheduled to be completed
- People or organization working on the project
- People or organization for whom the project is being done
- Overview of the contents of the progress report

### Project description

In most progress reports, include a project description to review the details of your project for the recipients.

#### Project Description

Here is a review of the purpose and scope of this project.

**Purpose.** The original investment plan of this corporation included only long-term, low-risk investment in corporate bonds and U.S. securities. This project was designed to answer questions about the potential of short-term, high-dollar investments, particularly those suited to the future expansion of this company's investment plan.

**Scope.** The report will cover basic definitions of stocks and options as well as reasons for and against these two investment strategies. The report will be broken down into four areas:

- Mechanics of stocks and options
- Comparisons of stocks and options
- Example investment scenarios
- Recommendations for an investment plan

## Conclusion

The final paragraph or section usually reassures audiences that all is going well and on schedule. It can also alert recipients to unexpected changes or problems in the project.

### Overall Appraisal

The project to recommend PET production is coming along well. I have not run into any major problems and have found plenty of material on this subject. However, I have not heard from Mr. Simon Juarez of PET Mfg., who is sending information on PET production methods used in several plants in the Southwest.

I can foresee no major problems that will keep me from submitting my report to you on the contract date. In fact, I may be able to get it to you a few days earlier than planned. In general, I am finding that the PET bottle is an even more attractive packaging idea than had seemed in our earlier discussions. Full details on this, however, will appear in the final report.

Sincerely,

Steven C. Crosswell

Process Engineer

C&S Engineering

## Revision Checklist for Progress Reports

As you reread and revise your progress report, watch out for problems such as the following:

- Make sure you use the right format. Remember, the memo format is for internal progress reports; the business-letter format is for progress reports written from one external organization to another. (Whether you use a cover memo or cover letter is your choice.)
- Write a good introduction—in it, state that this is a progress report, and provide an overview of the contents of the progress report.
- Make sure to include a description of the final completed project.
- Use one or a combination of the organizational patterns in the discussion of your work.
- Use headings to mark off the different parts of your progress report, particularly the different parts of your summary of work done on the project.
- Use lists as appropriate.
- Provide specifics—avoid relying on vague, overly general statements about the work you've done on the final report project.
- Be sure and address the progress report to the real or realistic audience—not your instructor.
- Assume there will be nonspecialists reading your progress report. But don't avoid discussion of technical aspects of the project—just bring them down to a level that nonspecialists can understand.