

Activity Report

Let's review some concepts

Definition

- ◆ Any activity reports are written at set periods, such as weekly, monthly, or quarterly.
- ◆ These periodic reports may be used simply to inform others of what is happening in a department or on a project, or they may become part of an employment record.

Purpose

- ◆ ongoing tasks
- ◆ specific activities
- ◆ special projects
- ◆ Accomplishments of individuals or departments

Reader

- ◆ Supervisors
- ◆ managers
- ◆ Colleagues

ABC Format: Activity Reports

- **ABSTRACT:** Time period, project, or event covered in report.
- **BODY:** List of activities or events
 - Organization that emphasizes type of activity, by project, or by client
 - Problems important to reader
- **CONCLUSION:** Future actions
 - Actions for continuing and ongoing activities
 - Plans for addressing problems or for the time period covered by the next report

Case Study

Nancy Fairbanks is simply submitting her usual monthly report. The greatest challenge in such reports is to classify, divide, and label information in such a way that readers can find what they need quickly. Fairbanks selected the kind of substantiative headings that help the reader locate information (e.g., “Jones Fill Project,” “Performance Reviews”).

TO: Ralph Buzby, Manager of Engineering
FROM: Nancy Fairbanks, Project Manager NF
DATE: August 1, 2012
SUBJECT: Activity Report for July 2012

Ralph Buzby
August 1, 2012
Page 2

July has been a busy month in our group. Besides starting and finishing many smaller jobs, we completed the Jones Fill project. Also, the John Lewis Dam borings began just a week ago. Finally, I did some marketing work and several performance reviews.

SMALL PROJECTS

Last month, my group completed nine small projects, each with a budget under \$20,000 and each lasting only a few days. These jobs were in three main areas:

- 1 Surveying subdivisions—five jobs
- 2 Taking samples from toxic sites—two jobs
- 3 Doing nearby soil borings—two jobs

All nine were completed within budget. Eight of the nine projects were completed on time. The Campbell County survey, however, was delayed for a day because of storms on July 10.

JONES FILL PROJECT

Our written report on this 12-month job was finally submitted to Trunk Engineering, Inc., on July 23. The delay was caused by Trunk's decision to change the scope of the project again. The firm wanted another soil boring, which we completed on July 22.

JOHN LEWIS DAM PROJECT

As you know, we had hoped to start work at the dam site last month. However, the client decided to make many design changes that had to be approved by sub-contractors. The final approval to start came just last week; thus our first day on-site was July 28.

MARKETING

During July, my main marketing effort was to meet with some previous clients, acquainting them with some of our new services. I met with eight different clients at their offices, with two meetings occurring on each of these dates: July 15, 16, 22, and 23. There's a good possibility that several of these meetings will lead to additional waste-management work in the next few months.

PERFORMANCE REVIEWS

As we discussed last month, I fell behind on my staff's performance reviews in June. In July, I completed the three delayed reviews, as well as the four that were due in July. Copies of the paperwork were sent to your office and to the Personnel Department on July 18. This brings us up to date on all performance reviews.

CONCLUSION

July was a busy month in almost all phases of my job. Because of this pace, I haven't had time to work on the in-house training course you asked me to develop. In fact, I'm concerned that time I devote to that project will take me away from my ongoing client jobs. At our next meeting, perhaps we should brainstorm about some solutions to this problem.

Write the conclusion for this report.

Progress Reort

- An informal report that provides your manager or client with details about work on a specific project.
 - Progress Reports cover progress on a specific project.
 - They can be directed inside or outside your organization
 - contain mostly objective data
 - written in a persuasive manner



Readers

- Supervisor
- Client

ABC Format: Progress Report

- **ABSTRACT:** Project and general progress (e.g., second week of a four-week project)
 - Capsule summary of main project(s)
 - Main progress to date or since last report
- **BODY:** Description of work completed since last report
 - Organization emphasizes task, chronology, or both
 - Clear reference to any dead ends that may have taken considerable time but yielded no results
 - Explanation of delays or incomplete work
 - Description of work remaining on project(s), organized by task, by time, or by both
 - Reference to attachments that may contain more specific information

- **CONCLUSION:** Brief restatement of work since last reporting period
 - Expression of confidence or concern about overall work on project(s)
 - Indication of your willingness to make any adjustments the reader may want to suggest
-

Task

Using the informal report guidelines, evaluate the level of effectiveness of the following progress report, which was written as part of the Wildwood Creek project. Develop responses to the following questions:

9

1. Does the report follow the ABC format? (Explain.)
2. What additional information does the report include? (Give examples.)
3. Who is the audience for the report? (Support your conclusion with evidence from the report)

Case Study

Scott Sampson, M-Global's personnel manager, is in the midst of an internal project being conducted for Jeannie McDuff, Vice President of Domestic Operations. Sampson's goal is to find ways to improve the company's training for technical employees. Having completed two of three phases, he is reporting his progress to McDuff. Note that Sampson organizes the body sections by task. This arrangement helps focus the reader's attention on the two main accomplishments—the successful phone interviews and the potentially useful survey. Also note that Sampson adopts a persuasive tone at the end of the report—that is, he uses his solid progress as a way to emphasize the importance of the project. In this sense, he is “selling” the project to his “internal customer,” Jeannie McDuff, who ultimately is in the position to make decisions about the future of technical training at M-Global.

From: Jeanine McBain, Vice President of Domestic Operations
Date: Scott Sampson, Manager of Personnel SS
Subject: June 11, 2012
Progress Report on Training Project

INTRODUCTORY SUMMARY

On May 21, you asked that I study ways our firm can improve training for technical employees in all domestic offices. We agreed that the project would take about six or seven weeks and involve three phases:

- Phase 1: Make phone inquiries to competing firms.
- Phase 2: Send a survey to our technical people.
- Phase 3: Interview a cross section of our technical employees.

I have now completed Phase 1 and part of Phase 2. My observation thus far is that the project will offer many new directions to consider for our technical training program.

WORK COMPLETED

In the first week of the project, I had extensive phone conversations with people at three competing firms about their training programs. Then, in the second week, I wrote and sent out a training survey to all technical employees in M-Global's domestic offices.

Phone Interviews

I contacted three firms for whom we have done similar favors in the past: Simkins Consultants, Judd & Associates, and ABG Engineering. Here is a summary of my conversations:

1. Simkins Consultants

Talked with Harry Roland, Training Director, on May 22. Harry said that his firm has most success with internal training seminars. Each technical person completes several one- or two-day seminars every year. These courses are conducted by in-house experts or external consultants, depending on the specialty.

2. Judd & Associates

Talked with Jan Tyler, Manager of Engineering, on May 23. Jan said that Judd, like Simkins, depends mostly on internal seminars. But Judd spreads these seminars over one or two weeks, rather than teaching intensive courses in one or two days. Judd also offers short "technical awareness" sessions during the lunch hour every two weeks. In-house technical experts give informal presen-

Newt, ABG's training program is much as it was two decades ago. Most technical people at high levels go to one seminar a year, usually sponsored by professional societies or local colleges. Other technical people get little training beyond what is provided on the job. In-house training has not worked well, mainly because of schedule conflicts with engineering jobs.

Internal Survey

After completing the phone interviews noted, I began the survey phase of the project. Last week, I finished writing the survey, had it reproduced, and sent it with a cover memo to all 450 technical employees in domestic offices. The deadline for returning it to me is June 17.

Work Planned

With phone interviews finished and the survey mailed, I foresee the following schedule for completing the project:

June 17:	Surveys returned
June 18-20:	Surveys evaluated
June 23-27:	Trips taken to all domestic offices to interview a cross section of technical employees
July 3:	Submission of final project report to you

CONCLUSION

My interviews with competitors gave me a good feel for what technical training might be appropriate for our staff. Now I am hoping for a high-percentage return on the internal survey. That phase will prepare a good foundation for my on-site interviews later this month. I believe this major corporate effort will upgrade our technical training considerably.

I would be glad to hear any suggestions you may have about my work on the rest of the project. For example, please call if you have any particular questions you want asked during the on-site interviews (ext 348).