GE2410

Unit 2: Writing Progress Reports

Aims and objectives

- In this unit, you will learn how to compose a **progress report.** By the end of this unit, you should be able to analyse and describe its-

- purposes

- generic organisation

- contents

- major language features

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Assessed Task 1

This task requires you to write an individual memo report to update Alisha Chan on the progress you have made in preparing for the presentation that your team will deliver in Assessed Task 2.

Your team need to meet up in Lesson 1 and 2 to decide the presentation topic and to discuss the following:

a) the sorts of information needed for the presentation;

b) the literature the team need to consult for the information;

c) how the work of information searches is divided among the team members.

☐ The individual report includes the following items:

☐ **An overview**

☐ **Work completed so far**

☐ **Work in progress and/or to complete:**

☐ **Evaluation**

☐ **Appendix**

☐ The report should be about 350-400 words in length

Assessment criteria

- Task Fulfilment
  - Required information
  - Relevances
  - Clarity
- Organisation
  - Cohesion of ideas
  - Paragraphing / sectioning
- Language
  - Grammar
  - Vocabulary
  - Style

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Task 1

- Together with your project team formed for Assessed Task 2, decide the following for **the seminar** and keep a record of the decisions made:

  ★ **topic** (see instructions for Assessed Task 2 on pp.16-17 of the Guide)

  ★ **types of information** to present in the seminar

  ★ **types of sources** to consult for the information

  ★ **how to identify the sources (reliability)**

  ★ **allocation of work for the information searches**

Task 1

- Team leaders:

- 1. make sure you have assigned different themes to your group mates

- 2. make sure your group mates know **which keywords / type of information to look for** in the next 2 weeks

- 3. set a deadline for them to report back their progress

- 4. make sure there is an effective platform for the team to communicate regarding the project.

Task 1

- The record will form the reference (Part 1) for the progress report which you will need to produce for Assessed Task 1.

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Task 1

- It is expected that by **lesson 4** you will have gathered some information you are responsible for as agreed in this discussion and have written your progress report draft. **There will be a peer review session in that lesson.**

- Share your draft (e.g. google doc) through the discussion forum "progress report peer review on Canvas, and invite your group mates and me to comment on the draft

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Task 1

- **The final report will be due on Sunday, October 4th 23:59 (through Turnitin on your section's Canvas.**

- **Keep a receipt of your submission for future reference**

Audience & Purposes

Audience

- External

  - the liaison person from the client organisation

  - the leader of the client team

- Internal
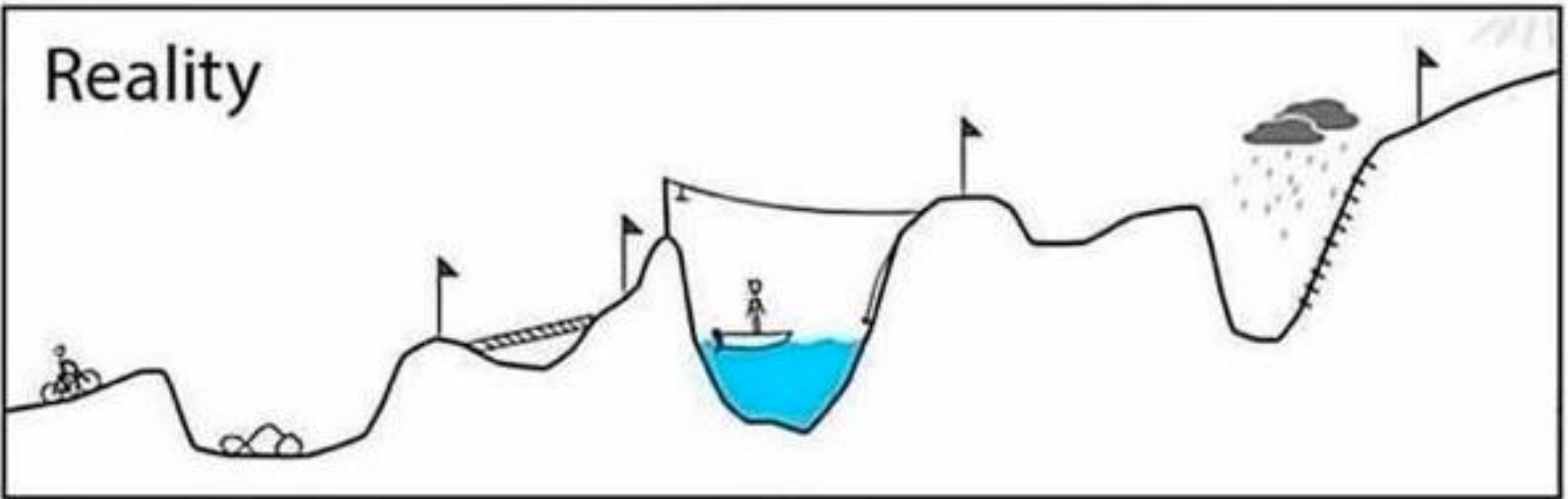
  - Senior consultant

  - Supervisor / project leader

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How's the progress?

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Your plan

Reality

Credit: Debbie and Me! @ TeacherTweaks

Purposes

- To reassure the audience:

  - that you are making progress

  - that the project is going smoothly

  - the project will be completed on time

- To let the audience to

  - evaluate your work

  - make decisions

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Purposes

- A chance to discuss problems and forewarn the recipient the possible delays / needs for making changes.

- Forces you to evaluate the progress you are making so that you can complete the work on time.

External vs Internal Reports

External Reports

- Generated for clients

- Produced at regular intervals

- Usually specified in contract

Internal Reports

- Generated for line manager

- Produced at regular intervals

- Reporting the progress made for the part the writer is responsible for

Group task

- In your group, conduct a google search and try to find a good example of a progress report

- What are the important elements/ sections which you think are crucial in a progress report?

- Prepare to present your examples.

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Task 2

- Study the sample reports shown in the Appendix. For each sample, state whether it is an internal or an external report. Also specify the form that each sample represents.

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Sample A

WEEKLY PROGRESS REPORT

Project Name: <u>CLIENT SERVER PROPOSAL</u>

To: G.K. Kelly, Manager

From: R.W. Barrow, Project Leader: Team 2

Date: 8-17-03

A chart (Internal)

<u>Document Specification Goals Scheduled</u>

		Goal Met	Goal Not Met
1.	Create project schedule	✓	
2.	Complete audience analysis		✓
3.	Define cross-functional team members	✓	
4.	Assign writing tasks	✓	
5.	Establish key themes		✓

Reasons for Not Meeting Goal:

    Goal #2 - unable to contact sufficient key people
    Goal #5 - cannot establish themes until audience
          analysis is completed

Plans for Meeting Goals: Scheduled meetings with clients next Tuesday (8/21)
               to complete Goal #2.
               Goal #5 can then be completed by Thursday (8/23).

Tracking Hours: Planning - 20 hrs.
(hours spent)   e-mailing - 2 hrs.

Sample B

Sample B

MEMO

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

PROGRESS SUMMARY

On May 21, you asked that I study ways our firm can improve training for technical employee 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

Sample C

Sample C

FROM: Jersey Manu (jmanu@ABCU.edu.hk)
TO: Dr. Jensen Wong (Staff Development Director) (jensen_wong@ABCU.edu.hk)
DATE: September 28, 2012
SUBJECT: Progress on faculty workshop plans

An email (Internal)

Hi Dr. Jensen,

Here's an update of the progress on the faculty workshop plans.

Work Completed

Preparation for the faculty workshop on October 12 is nearly completed. The committee met on September 19. We discussed what kind of subject we wanted and came up with several names of possible speakers.

Since then, Greg Stephens has contacted Stan Brannan, president of Genesis Technology Center in Wichita. He has agreed to come. Since then we have sent him a letter confirming the speaking engagement, and Greg Stephens has talked to him personally. He will be flying in on October 12.

I contacted John Campbell at Boeing. He got in touch with Al Andrews in their CAD-CAM division. Mr. Andrews has confirmed that either he or Tom McDabitt from his department will come to speak. A letter has been sent to him as well confirming the speaking engagement. Both letters were mailed Tuesday, September 27.

Please see the attachment for the invitation letters as well as the directions to the campus sent to both Mr. Andrews and Mr. Brannan.

Sample D

Sample D

To: George Chan <chantai@socialwork.gov.sm>
From: Mary Loel <mloel@gtech.com.hk)>
CC:
Date: January 10, 2012
Subject: 5th Progress Report of AIMS

Dear George,

Please find attached the 5th report on the progress made in the creation of the Awardee Information Management System (AIMS). The report provides a summary of the activity covering the period of June-December, 2011. As described in the report, the project is making good progress and is on schedule.

Should you have any questions, please feel free to contact me.

Yours sincerely,

Mary Loel

Senior Consultant
Global Technology

Awardee Information Management System:
The 5th Progress Report and Information Systems Analysis
(June – December, 2011)

Project goals and deliverables

The Awardee Information Management System (AIMS) is online system that requested by the City Government (Government thereafter). One of the major goals of system is to collect and analyze data of publicly funded social service projects carried out by non-government organizations (NGOs). The analysis is to help the Government determine how well each funded NGO has fulfilled the objectives outlined in the initial contract or agreement.

As agreed, AIMS is to produce a report that will contain uniform information about every NGO awardee who receives a fund from the Government, which includes the organization profile of the NGO, the fund contract awarded to the NGO, details of the progress made in the funded work, and an appraisal of the performance of the NGO. It was also agreed that a database that will support the report described above.

It was agreed that the project would take 27 months and would take place in six major phases

Phase	Work summary	Timelines
I	System Design	October 2010 - June 2011
II	Database construction	June - December 2011
III	Data analysis and reporting program development	August 2011 - April 2012
IV	Graphical interfaces	May - July 2012
V	System installation and on-site testing	August - December 2012
VI	User training and system documentation	January - February 2013

Forms and Organisation

Forms

- Verbal vs Written

Verbal

- reporting the progress verbally in a meeting

- formal / informal

  - meeting room

  - a short progress report in supervisor's office / over lunch at a restaurant

Written

- Formal report to client with formal cover email/letter

- an email

- a memo

- a chart

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Memo

- The memo header

- The report body

The header

| To:	name of the recipient
From:	name of the writer
Date:	date the memo was written
Subject:	the subject line that shows the subject matter of the report

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Task 3

- Study Sample Reports B to D as examined in Task 2.

- Identify the **major sections** in each sample, describe the types of information presented in each of the sections and state the purpose(s) that the information serves.
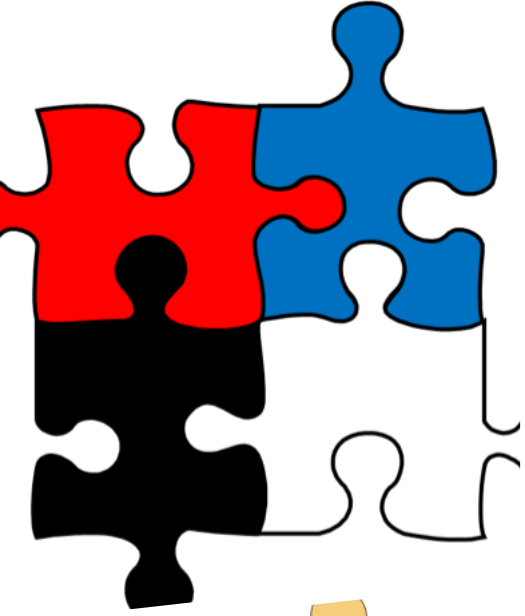
Generic Sections

- Project background / Progress Summary

- Work completed and issues arising

- Work in progress

- Future tasks

- Conclusion
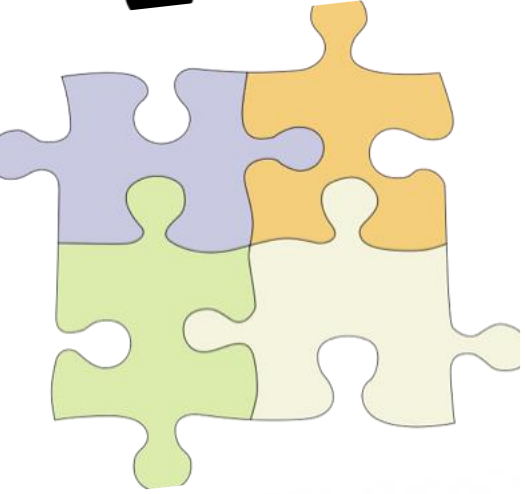
Project background

- Quick overview:

- Scope of the work agreed earlier

- Specific tasks supposed to have been completed by reporting time and outcomes of the tasks also as agreed earlier

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Work completed and Issues Arising

- The tasks actually completed

- The actual outcomes of the tasks

- Issues that have arisen

- Consequences of the issues

- Actions taken

Work in progress

- Tasks that are being carried out

- Expected outcomes of the tasks

- Expected dates of completion

Future tasks

- List tasks that will be carried out in the next reporting period and their expected outcomes.

Conclusion

- Provides an overall evaluation of the progress made in the reporting period

- Reassures the reader that the project is running well and forecasts the project completion date.

- Restores the reader's confidence in the team/the project if an adverse circumstance such as a delay or an interruption has been reported in a previous section.

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Reminder

☐ Remember that the work you report in your progress report for Assessed Task 1 is totally different from that presented in the sample reports. You are supposed to summarize *the reading* that you have done and how the information you gathered from the reading will be used in the public talk in Assessed Task 2.

☐ Do not report results of interviews, surveys, or experiments that you have never conducted. Doing so will result in a heavy penalty.

Language use

Task 4&5

- Study Samples B-D

- Observe the tense(s) that are used to describe actions that have been completed.

- What tone is used in the reports. State whether an impersonal or personal tone (I/We) used in the samples. Why is a personal tone used?

Task 6

- It is quite common to see previous communication referred to in a written progress report.

- Can you identify a few references made to prior communication in the Sample D? Why are the references made?

Task 7

- Study Report Sample D and circle the parts where emerging problems or issues (negative news) are reported.

- How does the writer present the events to reduce the negative impression they may create on the reader?

Next lesson

Progress report draft