## WRITING A PROGRESS REPORT

A *progress report* (also called a *status report*) informs readers about a project that is not yet completed.

### Purpose

The number of progress reports for any project usually is established at the outset, but more might be called for as the project continues. Progress reports are often required in construction or research projects so that decision makers can assess costs and the potential for successful completion by established deadlines. Although a progress report may contain recommendations, its main focus is to provide information, and it records the project events for readers who are not involved in day-to-day operations. The progress reports for a particular project make up a series, so keep your organization consistent from report to report to aid readers who are following one particular aspect of the project.

### Organization

Model 12-4 is a progress report written by the on-site engineer in charge of a dam repair project. The report is one in a series of progress reports for management at the engineering company headquarters. The writer addresses the report to one vice president, but copies go to four other managers with varying interests in the project. The writer knows, therefore, that she is actually preparing a report that will be used by at least five readers. Progress reports include the following sections.

#### Introduction

The introduction reminds readers about progress to date. Explain the scope and purpose of the project, and identify it by specific title if there is one. Follow these guidelines:

- State the precise dates covered by this particular report.
- Define important technical terms for nonexpert readers.
- Identify the major stages of the project, if appropriate.
- Summarize the previous progress achieved (after the first report in the series) so that regular readers can recall the situation and new readers can become acquainted with the project.
- Review any changes in the scope of the project since it began.

The writer in Model 12-4 numbers her report and names the project in her subject line to help readers identify where this report fits in the series. In her introduction, she establishes the dates covered in this report and summarizes the dam repairs she discussed in previous reports. She also indicates that the project is close to schedule, but that the expected costs have risen because another subcontractor had to be hired.

## Work Completed

This section describes the work completed since the preceding report and can be organized in two ways: You can organize your discussion by tasks and describe the progress of each chronologically, or you can organize the discussion entirely by chronology and describe events according to a succession of dates and times. Choose the organization that best fits what your readers will find useful, and use subheadings to guide them to specific topics. If your readers are interested primarily in certain segments of the project, task-oriented organization is appropriate. If your readers are interested only in the overall progress of the project, strict chronological organization is probably better. Follow these guidelines:

- Describe the tasks that have been completed in the time covered by the report.
- Give the dates relevant to each task.
- Describe any equipment changes.
- Explain special costs or personnel charges involved in the work completed.
- Explain any problems or delays.
- Explain why changes from the original plans were made.
- Indicate whether the schedule dates were met.

The engineer in Model 12-4 organizes her work-completed section according to the repair stages and then lists them in chronological order. She also includes the date on which each event occurred or each stage was completed.

## Work Remaining

The section covering work remaining includes both the next immediate steps and those in the future. Place the most emphasis on the tasks that will be cov-

ered in your next progress report. Avoid overly optimistic promises. Follow these guidelines:

- Describe the major tasks that will be covered in the next report.
- State the expected dates of completion for each task.
- Mention briefly those tasks that are further in the future.

The work-remaining section in Model 12-4 describes the upcoming stage of the repair work and states the expected completion date.

### Adjustments/Problems

This section covers issues that have changed the original plan or time frame of the project since the last progress report. If the project is proceeding on schedule with no changes, this section is not needed. If it is necessary, follow these guidelines:

- Describe major obstacles that have arisen since the last progress report. (Do not discuss minor daily irritations.)
- Explain needed changes in schedules.
- Explain needed changes in the scope of the project or in specific tasks.
- Explain problems in meeting original cost estimates.

The writer in Model 12-4 includes an adjustments section in her report to explain unexpected costs and a short delay because of the deteriorating condition of the dam area.

### Conclusion

The conclusion of a progress report summarizes the status of the project and forecasts future progress. If your readers are not experts in the technical aspects of the project, they may rely heavily on the conclusion to provide them with an overall view of the project. Follow these guidelines:

- Report any progress on current stages.
- Report any lack of progress on current stages.
- Evaluate the overall progress so far.

- Recommend any needed changes in minor areas of scheduling or planning.
- State whether the project is worth continuing and is still expected to yield results.

The engineer's conclusion in Model 12-4 assures her readers that, although she is three days behind schedule, she expects no further delays. She also identifies the final stage of the dam repairs and the expected completion date.

## STRATEGIES—Voice Mail

Do identify yourself and your subject immediately.

Do be specific and organized in your message.

Do state the time and date of your call if relevant.

Do close by indicating what kind of response you want.

Do not put confidential information or bad news on voice mail.

Do not shout, mumble, or speak too rapidly.

ACON CONSTRUCTION COMPANY
427 NOBLE STREET
MYCITY, HR 12321
(102) 444-5555

March 24, 1995

Dr. Shafiq Ahmad
660 Bluechip Way
Oro City, TH 12321

RE: Progress Report–Construction of Two-Story Residential House
1280 Gneiss Street, Oro City, TH

Dear Dr. Ahmad:

The status of construction is as follows:

FOUNDATION
Ace Foundations poured the concrete for the foundation on Friday, March 3. As a result of cracking of the foundation caused by the unexpected cold weather, Ace dug up the North side of the foundation and erected new forms on Friday, March 17, and will return to the site on Thursday, March 30, to repour the concrete. This operation requires approximately 2 days. Ace is prepared to work on the weekend, if necessary, for our convenience.

FRAMING
The framing operation is scheduled to begin on Monday, April 3. All primary structural members have been delivered to our site. No problems are anticipated.

BATHROOM FIXTURES
We ordered the bathroom fixtures on February 1. Because of temporary unavailability, the manufacturer substituted the brass faucet that you specified for the master bath with a similar faucet with pearl handles. I have enclosed the brochure for the substituted faucet. If this faucet is not acceptable, please contact me so that I may provide you with another alternative. This change does not affect price or delivery time for the fixtures. The estimated delivery date is June 1.

MISCELLANEOUS
We ordered the electrical and plumbing hardware, which will be delivered in 4 to 6 weeks. Everything else is progressing on schedule.

Please call me if you have any questions.

Very truly yours,

David Garcia

David Garcia, Project Manager
Acon Construction Company

TO: Mark Zerelli
Vice-President
Balmer Company

October 16,1999

FROM: Tracey Atkins TA
Project Manager

SUBJECT: Progress Report #3–Rockmont Canyon Dam

## Introduction

This report covers the progress on the Rockmont Canyon Dam repairs from September 15 to October 15 as reported previously. Repairs to the damaged right and left spillways have been close to the original schedule. Balmer engineers prepared hydraulic analyses and design studies to size and locate the aeration slots. These slots allowed Balmer to relax tolerances normally required for concrete surfaces subjected to high-velocity flows. Phillips, Inc., the general contractor, demolished and removed the damaged structures. To expedite repairs, construction crews worked on both spillways simultaneously. Construction time was further reduced by hiring another demolition company, Rigby, Inc. The project costs rose during the first month when Phillips, Inc., had to build batching facilities for the concrete because the dam site had no facilities.

## Work Completed

Since the last progress report, three stages of work have been completed:

1. On September 18, aggregate for the concrete mix was hauled 230 miles from Wadsworth, Oregon. The formwork for the tunnel linings arrived from San Antonio, Texas, on September 20.

2. Phillips developed hoist-controlled work platforms and man-cars to lower workers, equipment, and materials down the spillways. Platforms and man-cars were completed on September 22.

3. Phillips drove two 20-foot-diameter modified-horseshoe-shaped tunnels through the sandstone canyon walls to repair horizontal portions of the tunnel spillways. A roadheader continuous-mining machine with a rotary diamond-studded bit excavated the tunnels in three weeks, half the time standard drill and blast techniques would have taken. The tunnels were completed on October 15.

## Work Remaining

The next stage of the project is to control flowing water from gate leakage. Phillips will caulk the radial gates first. If that is not successful in controlling the flow, Phillips will try French drains and ditches. After tunnels are complete, both spillways will be checked for vibration tolerance, and the aeration slot design will be compared with Balmer's hydraulic model. Full completion of repairs is expected by November 15.

## Adjustments

Some adjustments have been made since the last progress report. During construction work on both spillways, over 50 people and 200 pieces of equipment were on the site. Heavily traveled surfaces had to be covered with plywood sheets topped with a blanket of gravel. This procedure added $3500 to the construction costs and delayed work for half a day.

## Conclusion

The current work is progressing as expected. The overall project has fallen three days behind estimated timetables, but no further delays should occur. The final stage of the project will require measurements at several areas within both spillways to be sure they can handle future flood increases with a peak inflow of at least 125,000 cfs. Balmer expects to make the final checks by November 25.

TA:ss
c: Robert Barr
Mitchell Lawrence
Mark Bailey
Joseph Novak

Many organizations have forms for organizing progress reports, and so no one format is best. But each report in a series should follow the same organization. The following memorandum illustrates how one writer organized her report.

**Progress Report (On the Job)**

SUBJECT: Progress Report: Equipment for New Operations Building

Work Completed

Our training group has met twice since our May 12 report in order to answer the questions you posed in your May 16 memo. In our first meeting, we identified the types of training we anticipate.

Types of Training Anticipated

- Divisional Surveys
- Loan Officer Work Experience
- Divisional Systems Training
- Divisional Clerical Training (Continuing)
- Divisional Clerical Training (New Employees)
- Divisional Management Training (Seminars)
- Special/New Equipment Training

In our second meeting, we considered various areas for the training room.

Training Room

The frequency of training necessitates our having a training room available daily. The large training room in the Corporate Education area (10th floor) would be ideal. Before submitting our next report, we need your confirmation that this room can be assigned to us.

To support the training programs, we purchased this equipment:

- Audioviewer
- 16mm projector
- Videocassette recorder and monitor
- CRT
- Mini/micro computer, for computer-assisted instruction
- Slide projector
- Tape recorder

This equipment will allow us to administer training in a variety of modes, ranging from programmed and learner-controlled instruction to group seminars and workshops.

Work Remaining

To support the training, we need to furnish the room appropriately. Because the types of training will vary, the furniture should provide a flexible environment. Outlined here are our anticipated furnishing needs.

Describes what remains to be done

- Tables and chairs that can be set up in many configurations. These would allow for individual or group training and large seminars.
- Portable room dividers. These would provide study space for training with programmed instruction, as well as allow for simultaneous training.
- Built-in storage space for audiovisual equipment and training supplies. Ideally, this storage space should be multipurpose, providing work or display surfaces.
- A flexible lighting system, important for audiovisual presentations and individualized study.
- Independent temperature control, to ensure that the training room remains comfortable regardless of group size and equipment used.

The project is on schedule. As soon as we receive your approval of these specifications, we will proceed to the next step: sending out bids for room dividers, and having plans drawn for the built-in storage space.

Gives a rough timetable

cc: R.S. Pike, SVP
G. T. Bailey, SVP

As you work on a longer report or term project, your instructor might require a progress report. In this next memo, Karen Granger documents her progress on her term project: an evaluation of the Environmental Protection Agency's effectiveness in cleaning a heavily contaminated harbor.

**Progress Report on Term Project**

**PROGRESS REPORT**

TO: Dr. John Lannon
FROM: Karen P. Granger
DATE: April 17, 1993
SUBJECT: Evaluation of the EPA's *Remedial Action Master Plan*

Work Completed

February 23: Began general research on the PCB contamination of the New Bedford Harbor.

March 8: Decided to analyze the *Remedial Action Master Plan* (RAMP) in order to determine whether residents are being "studied to death" by the EPA.

Summarizes achievements to date

March 9–19: Drew a map of the harbor to show areas of contamination. Obtained the RAMP from Pat Shay of the EPA.

Interviewed Representative Grimes briefly by phone; made an appointment to interview Grimes and Sharon Dean on April 13.

Interviewed Patricia Chase, President of the New England Sierra Club, briefly, by phone.

March 24: Obtained *Public Comments on the New Bedford RAMP*, a collection of reactions to the plan.

April 13: Interviewed Grimes and Dean; searched Grimes' files for information. Also searched the files of Raymond Soares, New Bedford Coordinator, EPA.

Work in Progress

Contacting by telephone the people who commented on the RAMP.

Work to Be Completed

April 25: Finish contacting commentators on the RAMP.

April 26: Interview an EPA representative about the complaints that the commentators raised on the RAMP.

Date for Completion: May 3, 1993

Complications

The issue of PCB contamination is complicated and emotional. The more I uncovered, the more difficult I found it to remain impartial in my research and analysis. As a New Bedford resident, I expected to find that we are indeed being studied to death; because my research seems to support my initial impression, I am not sure I have remained impartial.

Lastly, the people I talk to do not always have the time to find answers for my questions. Everyone, however, has been interested and encouraging, if not always informative.

Page 653 shows another progress report on a term project.