7 Progress Reports

This chapter covers:

- Reports to an outside organisation or funding body, to show the progress of your research in relation to your original research proposal (see also Chapter 5: *A Research Proposal*)
- Progress reports of a project team
- Checklists

A Progress Report to the Funding Body or Organisation

Purpose

To a funding body: To give a description in academic terms of your progress.

To a commercial organisation:

1. To show the organisation that its money is being appropriately spent, and the organisation will eventually reap benefits from your work (*see Point 1, How to Write It, below*).
2. To give the organisation a report that its members can understand *in their own terms.* (Remember there may be no expert in your field on the organisation's staff (*see Point 2, How to Write It, below*).
3. That your work is progressing along the lines of your original proposal. See also Chapter 5: *A Research Proposal.*
4. That your results are valid and non-trivial.
5. (Possibly) That your work is opening up into other directions *that will be of benefit to the organisation.*

How to write it

A funding body usually has guidelines for progress reports. Follow these, using the principles given in this chapter.

For a commercial organisation, two points need to be kept in mind:

1. **The organisation or company is specifically interested in how your results are going to benefit them.**
   Rather than the academic implications of your work, the company will be more interested in how your results will contribute to its competitiveness and profitability. This may not be the case for some large companies, which may be wealthy enough to be able to fund 'blue-skies' research, knowing that in the long term, the academic information will contribute to

their wealth. However, many companies have to concentrate on their immediate or mid-term business plan. Moreover, if your work is suddenly opening up into an academically interesting and unexpected direction, they may be less enthusiastic than you about pursuing it.

2. **Your report may need to be understood by people with no expertise in your particular field.**
   There may be no one who is familiar with the basic knowledge and terminology of your subject. Even in companies that have the expertise, your report may be passed on to people such as financial personnel.

Your report should therefore:

- Be written so that the organisation can clearly see the benefits to the company's activities.
- Show that you have carried out the work as originally proposed.
- Be written in language that does not need expert knowledge to be understood.
- Use a *Glossary of Terms* to clearly explain terminology that may not be familiar to the organisation.
- Clearly state your proposals for the next stage of the work.

Possible Structure

If you are directing the report to company personnel who are predominantly research-based, it may be appropriate to use the classic *TAIMRAD* structure (*Title, Abstract, Introduction, Methods, Results and Discussion*). If not, the following structure or variations of it may be appropriate.

Section	Cross-Reference to Relevant Part of This Book
Title Page This may need to contain the following features: • Title of the project • The number of the report in the series that you are preparing (e.g. Report number 2) • Date • Suggested wording: Completed for (*name of company*) to fulfil the requirements stipulated in the (*name of the contracting organisation*) contract (*date*) • Your name, department, institution, contact phone and fax numbers, e-mail address	**Title** and **Title Page**, Chapter 2: *The Core Chapter*, page 19
Executive Summary A summary of no more than one page of your main results and main recommendations. Keep in mind the two points in **How to Write It**, above.	Chapter 3: *An Abstract; a Summary; an Executive Summary*, page 54
Table of Contents	**Table of Contents**, Chapter 2: *The Core Chapter*, page 23

Glossary of Terms and Abbreviations
Terms explained so that a non-expert in the field can
  understand them.
Recommendations
	Glossary of Terms and
	  Abbreviations, Chapter 2:
	  The Core Chapter, page 27
	Recommendations, Chapter
	  2: *The Core Chapter*, page
	  40

Techniques
Your techniques may have developed or altered from
  the ones you originally projected. They need to be
  described clearly but not necessarily in the detail
  required for a journal paper. If your procedures have
  remained the same, you still need to describe them
  briefly with reference back to the previous reports.
Sections appropriate to the topic, describing
  the results.
	Materials and Methods,
	  Chapter 2, page 36

Conclusions
A description of your conclusions from the work to date.
	Conclusions, Chapter
	  2: *The Core Chapter:*
	  Sections and Elements of a
	  Document, page 39

Updated project plan and expected time frame for
  the remaining activities
A clear description of the expected remaining stages of
  your research. If appropriate, show how your plan has
  developed and possibly altered from your original,
  projected plan.
State your expected time schedule for the following:
1. The various future tasks (preferably with a Gantt chart)
2. The schedule of future reports that you will write
  for the organisation
	Schedule of Tasks/Time
	  Management, Chapter
	  2: *The Core Chapter:*
	  Sections and Elements of a
	  Document, page 33

If appropriate:
Requirements for the next stage
A statement of what you expect to need from your funding
  organisation for the next stage of research.
References or **Bibliography**
	Requirements, Chapter
	  2: *The Core Chapter:*
	  Sections and Elements of a
	  Document, page 35
	Chapter 15: *Referencing:*
	  Text Citations and the List of
	  References, page 169

Appendices	**Appendices**, Chapter 2: *The Core Chapter*, page 42

Intermediate progress reports should briefly refer back to previous reports.
The final report should do the following:

- Tie up all the work into a logical story.
- Concentrate particularly on the overall results, conclusions and recommendations.
- *If appropriate*, give guidelines about how the work could be further developed (see **Suggestions for Future Research**, Chapter 2: *The Core Chapter*, page 41).

Checklist for a Progress Report to a Commercial Organisation

☐ Does your report clearly show how your work will benefit the company's activities?
☐ Does it use language that can be understood by a non-expert in your immediate field?
☐ Does it explain terminology that may not be familiar to the company's personnel?
☐ Does it clearly show the direction your research is taking?
☐ Does it refer back to your previous progress reports?
☐ Does it explain your progress since your previous report?
☐ Does it describe any procedure that you have used and was not projected in previous reports?
☐ Does it show the expected time frame for future activities?
☐ *In the final report*:
    ☐ Does it tie up all your work into a logical story?
    ☐ Does it clearly describe your recommendations?
    ☐ Does it show how the work could be further developed?

A Project Team's Progress Reports

Purpose

To report at intervals on the progress of a management project undertaken by several individuals.

Possible structures for a series of progress reports

1. Initial report at the start of the activity

This is likely to be similar to a project proposal, in which you describe how you will approach the task. As with any plan, it will involve intelligent and informed guesswork. Use the principles given in Chapter 5: *A Research Proposal*.

You will probably need the following elements:

	Cross-Reference to Relevant Part of This Book
1. Executive Summary	Chapter 3: *An Abstract, a Summary, an Executive Summary*, page 60
2. Objectives	**Objectives**, Chapter 2: *The Core Chapter*, page 30
3. Initial analysis of the problem	**Problem Statement**, Chapter 2: *The Core Chapter*, page 32
4. A preliminary literature survey	Chapter 4: *A Literature Review*, page 63
5. A clear statement of how you propose to tackle the first stages of the project, together with a brief description of the methods you will use	**Materials and Methods**, Chapter 2: *The Core Chapter*, page 36

6. *If needed*: **Schedule of Tasks**	**Schedule of Tasks/Time Management,** Chapter 2: *The Core Chapter*, page 33
7. **Allocation of responsibilities** A description of the roles of the various individuals in the team.	**Allocation of Responsibilities**, Chapter 2: *The Core Chapter*, page 33

2. **Intermediate reports**

   For intermediate progress reports, use the principles given in this chapter in *Progress Report to the Funding Body or Organisation*, page 111.

3. **The final report**

   Again, use the principles given in *Progress Report to the Funding Body or Organisation*, page 111, and also take the following into consideration:
   - This report will probably need to be longer than the preceding reports.
   - It will need to tie up the whole body of work into a logical story.
   - It should concentrate on the **results**, **conclusions** and **recommendations**.
   - *If required*, include a description and possibly a peer review of the tasks undertaken by the various individuals.
   - *If appropriate*, include a description of how the work you have done could be further developed in the future. See **Suggestions for Further Development**, Chapter 2: *The Core Chapter*, page 41.

Checklist for a Project Team's Progress Reports

Does your first report:

☐ Give your team's objectives?
☐ Give an initial analysis of the problem?
☐ Give a brief preliminary survey of the literature?
☐ Describe the various tasks you foresee?
☐ Describe the techniques you will use?
☐ Give a schedule and time frame for the various tasks?
☐ Describe the roles of the various individuals?

Do your intermediate reports:

☐ Clearly show the direction your work is taking?
☐ Describe your progress since your previous report, with brief reference to those reports?
☐ Describe any method or technique that you have used and was not projected in previous reports?
☐ Give your conclusions from the work so far?
☐ Show the expected time frame for future activities?

Does your final report:

☐ Tie up the whole body of work into a logical story?
☐ Concentrate on results, conclusions and recommendations?
☐ *If required*, give a description of the tasks and peer review of the various individuals in the team?
☐ *If appropriate*, show how the work can be developed further?