Lecture 28
Progress Reports

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Typical Writing Situations
Progress reports are prepared in two types of situations.
In the first, you tell your readers about your progress on one particular project. As a geologist employed by an engineering consulting firm, Lee must do this. His employer has assigned him to study the site that a large city would like to use for a civic center and large office building. The city is worried that the site might not be geologically suited for such construction. Every two weeks, Lee must submit a progress report to his supervisor and to the city engineer. Lee's supervisor uses the progress report to be sure that Lee is conducting the study in a rapid and technically sound manner. The city engineer uses the report to see that Lee's study is proceeding according to the tight schedule planned for it. She also uses it to look for preliminary indications about the likely outcome of the study. Other work could be speeded up or halted as a result of these preliminary findings.

In the second type of situation, you prepare progress reports that tell about your work on all your projects. Many employers require their workers to report on their activities at regular intervals all year round, year in and year out. Jacqueline is a person who must write such progress reports (often called periodic reports). She works in the research division of a large manufacturer of consumer products, where she manages a department that is responsible for improving the formulas for the company's laundry detergents—making them clean and smell better, making them less expensive to manufacture, and making them safer for the environment. At any one time, Jacqueline's staff is working on between ten and twenty different projects.

As part of her regular responsibilities, Jacqueline must write a report every two weeks to summarize the progress on each of the projects. These reports have many readers, including the following people: her immediate superiors, who want to be sure that her department's work is proceeding satisfactorily; discoveries they can use in the products they are responsible for (for example, dishwashing detergents); and corporate planners, who want to anticipate changes in formulas that will require alternations in production lines, advertising, and so on. As the examples of Lee and Jacqueline indicate, progress reports can vary from one another in many ways: they may cover one project or many; they may be addressed to people inside the writer's organization or outside it; And they may be used by people with a
variety of reasons for reading them, such as learning things they need to know to manage and to make decisions.

The Readers’ Concern with the Future
Despite their diversity, however, almost all progress reports have this in common: their readers are primarily concerned with the Jacqueline future. That is, even though most progress reports talk primarily about what has happened in the past, their readers usually want that information so that they can plan for and act in the future. Why? Consider the responsibilities that your readers will be fulfilling by reading your progress reports. From your report, they may be trying to learn the things they need to know to manage your project. They will want to know, for instance, what they should do (if anything) to keep your project going smoothly or to get it back on tract. The reports written by Lee and Jacqueline are used for this purpose by some of their readers. From your report, some people may also be trying to learn things they need to know to manage other projects. This is because almost all projects in an organization are interdependent with other projects.

For example, other people and departments may need the results of your project as they work on their own projects. Maybe you are conducting a marketing survey whose results they need so that they can design an advertising campaign, or maybe your company can install other equipment. If your project is going to be late, the schedules of those projects will have to be adjusted accordingly. Similarly, if your project costs more than expected, money and resources will have to be taken away from other activities to compensate. Because of interdependencies like these, your readers need information about the past accomplishments and problems in your project so that they can make plans for the future. Similarly, your readers will often be interested in learning the preliminary results of your work.

Suppose, for instance, that you complete one part of a research project before you complete the others. Your audience may very well be able to use the result of that part immediately. The city engineer who reads Lee’s reports about the possible building site is especially interested in making this use of the information Lee provides.

The Questions Readers Ask Most Often
The readers’ concern with the implications of your progress for their future work and decisions leads them to want you to answer the following questions in your progress reports. If your report describes more than one project, your readers will ask these questions about each of them.

**What work does your report cover?**
To be able to understand anything else in a progress report, readers must know what project or projects and what time period the report covers.

**What is the purpose of the work?**
Readers need to know the purpose of your work to see how your work relates to their responsibilities and to the other work, present and future, of the organization.

**Is your work progressing as planned or expected?**
Your readers will want to determine if adjustments are needed in the schedule, budget, or number of people assigned to the project or projects you are working on.

**What results did you produce?**
The results you produce in one reporting period may influence the shape of work in future periods. Also, even when you are still in the midst of a project, readers will want to know about any results they can use in other projects now, before you finish your overall work.
What progress do you expect during the next reporting period?
Again, your readers’ interests will focus on such management concerns as schedule and budget and on the kinds of results they can expect.

How do things stand overall?
This question arises especially in long reports. Readers want to know what the overall status of your work is, something they may not be able to tell readily from all the details you provide.

What do you think we should do?
If you are experiencing or expecting problems, your readers will want your recommendations about what should be done. If you have other ideas about how the project could be improved, they too will probably be welcomed.

Superstructure for Progress Reports
To answer your readers’ questions, you can use the conventional superstructure for writing progress reports, which has the following elements:
1. Introduction
2. Facts
3. Discussion
4. Conclusions
5. Recommendations

In the introduction to a progress report, you should answer the following two questions:
1. “What work does your report cover?”
2. “What is the purpose of the work?”

Introduction
You can usually answer the question, “What work does your report cover?” by opening with a sentence that tells what project or projects your report concerns and what time period it covers. Sometimes you will not need to answer the second question “What is the purpose of the work?” because all your readers will already be quite familiar with your work’s purpose. At other times, however, it will be crucial for you to tell your work’s purpose because your readers will include people who don’t know or may have forgotten it. You are especially like to have such readers when your written report will be widely circulated in your own organization or when you are writing to another organization that has hired your employer to do the work you describe.

You can usually explain purpose most helpfully by describing the problem that your project will help your readers solve. The following sentences show how one manager answered the readers’ first two questions: This report covers the work done on the Focus Project from July 1 through September 1. Sponsored by the U.S. Department of Energy, the aim of the Focus Project is to overcome the technical difficulties encountered in manufacturing photovoltaic cells that can be used to generate commercial amounts of electricity.

Project and Period Covered
Purpose of Project
Facts and Discussion
In the discussion section of your progress report, you should answer questions from your readers:
“Is your work progressing as planned or expected?”
“What results did you produce?” and,
“what progress do you expect during the next reporting period?”

Answering your Readers’ Questions
In many situations, the work for each reporting period is planned in advance. In such cases you can easily tell about your progress by comparing what happened with what was planned.
Where there are significant discrepancies between the two, your readers will want to know why. The information you provide about the causes of problems will help your readers decide how to remedy them. It will also help you explain any recommendations you make later in your report. When you are discussing preliminary results that your readers might use, be sure to explain them in terms that allow your readers to see their significance. In research projects, preliminary results are often tentative. If this is the case for you, let your readers know how certain—or uncertain—the results are. This information will help your readers decide how to use the results.

When preparing progress reports, people often wonder how much information they should include. Generally, progress reports are brief because readers want them that way. While you need to provide your readers with specific information about your work, don’t include details except when the details will help your readers decide how to manage your project or when you believe that your readers can make some immediate use of them.

In many projects, you will learn lots of little things and you will have lots of little setbacks and triumphs along the way.

Avoid talking about these matters. No matter how interesting they may be to you, they are not likely to be interesting to your readers.

Stick to the information your readers can use.

Organizing the Discussion

You can organize your discussion section in many ways. One is to arrange your material around time periods:

1. What happened during the most recent time period?
2. What’s expected to happen during the next time period?

You will find that this organization is especially well-suited for reports in which you discuss a single project that has distinct and separate stages, so that you work on only one task at a time. However, you can also expand this structure for reports that cover either several projects or one project in which several tasks are performed simultaneously:

What happened during the most recent time period?
Project A (or Task A)
Project B
What’s expected to happen during the next time period?
Project A
Project B

When, you prepare reports that cover more than one project or more than one task, you might also consider organizing around those projects or tasks:

Work on Project A (or Task A)
What happened during the last time period?
What’s expected to happen during the next time period?
Work on Project B
What happened during the last time period?
What’s expected to happen during the next time period?

This organization works very well in reports that are more than a few paragraphs long because it keeps all the information on each project together, making the report easy for readers to follow.

Emphasizing Important Findings and Problems

As mentioned, your findings and problems are important to your readers. Your findings are important because they may involve information that can be used right away by others. The problems you encounter are important because they may require your readers to change their plans. Because your findings and problems can be so important to your readers, be sure that you devote enough discussion to them to satisfy your readers’ needs and desires for information. Also, place these devices so that they are easy to find.
Conclusions
Your conclusions are your overall views on the progress of your work. In short progress reports, there may be no need to include them, but if your report covers many projects or tasks, a conclusion may help your readers understand the general state of our progress.

Recommendations
If you have any ideas about how to improve the project or increase the value of its results, your readers will probably want you to include them. Your recommendations might be directed at overcoming in the future. Or they might be directed at refocusing or otherwise altering the period.