

# TIDEE

Transferable Integrated Design Engineering Education



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## Communication

### Section 2: Progress Reports

This section includes:

- **Specifying Team Progress Reports**
- **Reporting Progress to Clients**
- **[IR] Providing Feedback on Progress Reports**

In your career as an engineer, progress reporting will likely be a responsibility that falls upon your desk to complete. Typically, you will be charged with presenting status updates – oral and written – to supervisors, clients, and team members. The activities in this section are structured to help you decide what types of information should be collected and presented in a progress report.

The first activity, *Specifying Team Progress Reports*, explores and identifies the content of information that must be exchanged to support a team design project. The goal of the progress report template is to consider categories of information that are critical to coordinating and prioritizing project activities. An example template is provided as a catalyst for your own ideas.

The second activity, *Reporting Progress to Clients*, centers on content as well as format (e.g. letter, email, PowerPoint) for customer reports. Knowledge of your audience is key. Speaking or writing to the level of interest and technical understanding of your client is crucial to satisfying their needs.

The concluding material in this section is an Instructor Resource that provides a framework from which to provide feedback on students' progress.

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## Activity: Specifying Team Progress Reports

*Keeping team members informed about design project progress, plans, and concerns is crucial for teams to prioritize and coordinate their activities. The varied information needs of different members suggest that several types of information be exchanged on a regular basis. In this activity, you will explore information needs for a team design project and specify the content of regular team progress reports.*

**Objective:** Define guidelines for regular team progress reports to support team design project activities.

### Tasks

1. Assign members roles to support this activity.
2. As a team, list the types of problems that may occur on a design team when members do not have information they need from other members. Record your list of potential problems and information needs on the Team Progress Report Needs handout.
3. Prioritize the information needs and identify those that should be included in regular (e.g., weekly) progress reports to team members.
4. As a team, review the Sample Progress Report handout. Identify two strengths and two improvements needed for the progress report template.

### Deliverables

1. Team Reporter presents:
  - a) A list of priority information items for inclusion in regular team progress reports
  - b) Two recommendations for improving progress report format and rationale for each change
2. Team Reflector reports:
  - a) The purpose of member reflection in a regular progress report to team members
  - b) An insight gained from this activity
3. Team homework (due in next class):
  - a) Prepare a template for your progress reports to team members (and to the instructor).
  - b) Define the timing and handling of these reports to achieve maximum benefit.

### Criteria for Success

- Teams identify high value information to be exchanged regularly to support team performance.
- Teams produce a template and procedure to facilitate effective information exchange.
- Teams recognize value of regular updates and analysis of project progress.

### Resources

- Personal experience in team and project activities
- Worksheet: Team Progress Report Needs
- Handout: Example Team Progress Report
- 15 minutes of team discussion time

## Worksheet: Team Progress Report Needs

Potential Problem	Information Need
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
11.	
12.	
13.	
14.	
15.	

## Handout: Example Team Progress Report

<b>Name:</b> Member 4		<b>Project:</b> XXYYZZ Device	
<b>Date:</b> 3/26/2003	<b>Reporting Period:</b> 3/12/03-3/26/03	<b>Hours on Project this Period:</b> 14	
<b>PROGRESS FOR REPORTING PERIOD</b>			
<b>Your Goal(s) for this Period:</b>	Order the necessary parts for the physical setup. Finalize design of the screen behind the subject. Finalize the materials used for the markers on the subject. Work on programming with Member 2. Create a detailed plan for the frame, with angles and dimensions listed.		
<b>Actions Taken to Achieve Your Goal(s):</b>	Created a detailed parts list which included price, description, quantity and where item can be purchased. Worked out frame and screen measurements to make sure they will fit with geometric equations Member 1 has produced. Also wanted to ensure cameras would encompass subject and screen in their views. Broke down framing network into individual parts and had Member 1 double check my calculations to make sure we had the correct quantities for wood, hinges, pins, etc. Discussed screen options with group.		
<b>Specific Achievements:</b>	Itemized all parts of physical device and priced them. Decided to build screen using 2x2's, just as frame. All physical parts have been ordered or can be purchased. Dimensions for frame and screen were suitable for Amanda's calculations and design requirements.		
<b>Assessment of Your Success:</b>	I have been productive over the past reporting period. Ordering parts was an important event for the success of the project. Breaking down device into the smallest components helped further define design specifications.		
<b>Insights Gained:</b>	It is beneficial to have people check progress and work through calculations together. Asking for help and knowing when you need assistance is a good personal/professional skill.		
<b>PLANS FOR NEXT REPORTING PERIOD</b>			
<b>Your Goal(s) for Next Period:</b>	Build frame for cameras! Catch up on everything Member 2 did over break with LabView.		
<b>Plans to Achieve Your Project Goal(s):</b>	Meet with Member 1 Monday morning from 9-11 to work on programming and have her explain the additional things she has learned. . Purchase parts from Zenith Building Supply and meet with Member 1 and Member 3 to start building.		
<b>Planned Professional Development:</b>	Teamwork – work closely with other members of team.		
<b>SOUNDING AN ALERT !!</b>			
<b>Conditions of Project Concern:</b>	Concern that program development is behind schedule. This may result in our inability to obtain test data in time for presentation to client.		
<b>Recommended Actions (what/by whom):</b>	Check with Member 2 to see if workload can be shifted to speed up program development and testing.		

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## **Activity: Reporting Progress to Clients**

*Maintaining interaction with project clients is important to establishing supportive relationships, accessing project resources, and receiving valuable feedback. Design project teams need to determine reporting protocols that best fit their project and the client's interests. In this activity, your team will explore issues surrounding client interactions and select reporting methods that best fit the project and client.*

**Objective:** Establish a plan for providing project clients regular progress updates that meet their needs and enhance potential for project success.

### **Tasks**

1. Assign team members to roles that support this activity.
2. As a team, discuss the relationships of your project client(s) with your team and your design project. From this discussion, estimate the extent of project involvement your client desires and the type of information of interest on a regular basis. Record this information at the top of the Client Updates worksheet.
3. Discuss formats for reporting progress to clients (e.g., letter, email). List on the worksheet these formats and their corresponding advantages and disadvantages for client updates.
4. Prioritize information items based on client interests and your needs. Considering time and space limitations and your information priorities, characterize (define length, focus, etc. for) each of your priority items for client updates. Record these on your worksheet.

### **Deliverables**

1. The team Reporter presents priority information items and the preferred format for client updates.
2. The team Reflector presents:
  - a) One strength of the team in this activity
  - b) One area for team improvement
  - c) An insight you gained personally from this activity
3. Team homework (due next class): Define team guidelines for preparing and delivering regular feedback to project clients.

### **Criteria for Success**

- Team are able to define information needs from a client's perspective.
- The team Reflector is able to give valuable feedback for improving team performance.

### **Resources**

- Personal experiences with busy professional people and progress reports
- Worksheet: Client Updates
- 15 minutes of team discussion time

## Worksheet: Client Updates

### Client Interest in Your Project

Frequency of updates desired: \_\_\_\_\_

Length of Report: \_\_\_\_\_

Type of information of interest to client:

### Formats for Reporting

Reporting Formats

Desirable Attributes

Undesirable Attributes

### Progress Report Content

Item to Include

Characteristics/Specifics

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## **[IR]: Providing Progress Report Feedback**

*Instructor feedback is important to students because they need confirmation that their work and judgments are not flawed. However, an instructor of a large design class has limited time available to provide feedback on any given student's progress report. Thus, feedback given must focus on the issues of greatest importance and those that can impact student performance. This resource material gives guidance for efficient and valuable feedback on progress reports.*

**Objective:** Identify strategies for providing students useful feedback on their progress reports with reasonable time investment.

### **Tasks**

1. Identify those questions of importance to students when preparing progress reports:
  - Am I making (and communicating) progress expected of me? If not, what is expected? What do I need to do to meet those expectations? Am I missing something?
  - How do I improve in areas where I am struggling? Where do I find help or resources?
  - How do I deal with issues affecting the team (conflicts, inactivity, lack of openness)?
2. Define what is a reasonable set of feedback (from giver and receiver perspectives):
  - Overall perspective on progress and work quality
  - Strengths observed and ways to use these for the benefit of yourself and the team
  - Improvements needed and how to achieve them
3. Adopt a standard format for providing feedback that makes your effort efficient and provides students valuable information. Begin by reviewing the Example Progress Report Feedback handout (attached) and determining its strengths and areas needing refinement to meet your needs.
4. Determine a process that works efficiently. For example, if students submit progress reports to you electronically, you may choose to provide feedback by a reply message into which you paste your feedback form and type your feedback.

### **Deliverables**

1. Create a Progress Report Feedback Form to fit your needs.
2. Begin using your feedback form to give students valuable feedback on progress reports.
3. Identify an insight you gained from this process of preparing to give feedback on progress reports.

### **Criteria for Success**

- You identify what is most important as feedback to student regarding their progress reports.
- You establish an efficient but effective tool for providing feedback on progress reports.
- You learn from your preparation efforts.

### **Resources**

- Your experience with design teams and their performance concerns
- Handout: Example Progress Report Feedback

## Handout: Example Progress Report Feedback

*The following is the feedback provided to a student regarding a progress report submitted for a week-long period.*

### Feedback on Progress Report

**Name:** Member 4

**Report Date:** 3/26/03

**Overall Progress and Work Quality:**

Attribute of Progress Report	Max Pts	Points
Report completed and distributed on time	2	2
Substantive progress made toward goals	3	3
Sound plan presented for next reporting period	3	3
Reviewed progress/project status critically	1	1
Proactively addressed personal/project needs	1	1
<b>Total</b>	<b>10</b>	<b>10</b>

**Comments:**

Your report shows significant effort and progress toward on-time completion. Your concern about programming progress is merited; pursue workload adjustments as you suggested to speed the programming. Your reflections and self assessments of progress show that you continue learning as you complete the project.

**Strengths:**

You are coordinating well with other team members, which ensures that all parts of the project are developing in concert. Your close interaction is vital at this stage of the project to prevent actions that cause project parts to conflict at a late stage that does not allow time to take corrective action.

You exhibit an ability to take action when needed: having others check your work, checking on others' progress, arranging to work together. This is very valuable for averting problems and staying on schedule.

**Areas to Improve:**

You did not mention a need for safety training prior to beginning fabrication work. Check with the shop foreman to schedule orientation to the equipment you will use and to shop safety procedures. Your plans to work on the weekend will require special precautions and prudent action in the case of an emergency.