

Research Management Reporting

Having a structured reporting strategy to document your project, set up clear expectations, raise issues, plan actions and communicate progress and decisions can be very helpful. The template presented here can be used by research staff as part of their communication strategy and can be adapted to specific project needs.

1. Overall Project Indicator – Visually identifies the overall status of the project. You can use GREEN to indicate that you don't have any significant issues to report, YELLOW to report that manageable issues have surfaced and RED to report that critical issues have surfaced. Use a qualitative approach to select the appropriate overall project status instead of trying to simply aggregate individual indicators. For example, you could decide to keep the overall status as RED until you solve a specific issue, even though the majority of the individual indicators are GREEN.

2. Report Paradata – Provides contextual information about the report itself (report period, date, authors, project name and phase).

3. Executive Summary – Typically consists of a single paragraph. You can choose to summarize status and/or highlight crucial information.

4. Individual Indicators – Provides an assessment of the main aspects of project management (scope, time, cost, quality, risk, external dependencies, human resources, procurement and integration). Other indicators can be added when appropriate. In the context of primary data collection, for example, you might want to add indicators related to research ethics documentation and approval.

5. Main Section – It is useful to create subheadings either by type of communication (e.g. project highlights and updates, decision/action required, agreement/acknowledgement) or by content (e.g. manuscript writing, budget, phase I).

6. Appendices – Some appendices can be a regular part of the report, typically key performance indicators such as recruitment rates for a data collection project or publication statuses for knowledge translation projects. It is good practice to append larger amounts of information.

Overall Y 1	Project: Template project Client(s): Chico Buarque, Caetano Veloso Report period: January 2015 (Jan 10 to Feb 6) Project phase: Data Collection Report date: February 9, 2015 Prepared by: Gal Costa	2
SUMMARY 3		
The Schedule and External Dependencies indicators are marked yellow since we didn't receive REB approval to start 6 months data collection. A revised timeline has been prepared for approval. Baseline continues to progress well.		
Scope G	Schedule Y	Budget G
Human Resources G	Risk G	Quality G
		External Dependencies Y 4
PROJECT HIGHLIGHTS AND UPDATES 5		
<ul style="list-style-type: none"> A total of 67 baseline interviews were completed during January. Please refer to Appendix 1 for more detailed information. Letters were mailed to all participants not yet recruited for a Baseline interview using addresses from the recent MCSS report. 		
DECISION/ACTION REQUIRED		
<ul style="list-style-type: none"> We revised the order of instrument documents to accommodate the inclusion of XY instrument. Please review and approve the new version (appendix 2). Please review and approve revised project timeline (Appendix 3). 		
AGREEMENT/ACKNOWLEDGMENT		
<ul style="list-style-type: none"> The changes to the interview window described in the December 2014 PM report were approved. The first draft of instrument set C (version Dec 22, 2014) was reviewed and approved. 		

6 **APPENDICES** (following the pages of the report)

CRICH Survey Research Unit - General Reporting Guidelines

Well planned project management can help foster high quality research.

- **When possible, deliver the report in person.**
Use the *development* of the report as a regular opportunity to meet with your team. Use the *delivery* of the report as a regular opportunity for you to meet with your supervisor/client/partner.
- **Keep it short.**
The report should be from 1 to 3 pages, not counting appendices. Consider doing more frequent reports if needed.
- **Balance action and information.**
Document all necessary information, but make sure you make clear what action you need, from whom, and by when.
- **Interpret, don't just report.**
Provide context and impact for the information you give.
- **Be open and honest about the project status.**
It's good to be positive, but don't avoid giving bad news. Raise issues and risks earlier rather than later. This provides everyone with more time to react. It will also prevent you from having to explain why you didn't raise issues before. Also make sure you have the channels for your team to raise risks and issues with you.
- **When raising significant issues put forward a solution or plan whenever possible.**
Remember that issues are an expected part of any project. It's how much we can anticipate them and how we address them that make a difference.
- **Key indicators should be treated as such**
Spend some time identifying and planning the best way to track and report key indicators and, if possible, consistently include them in your project management reports.
- **Use appropriate language.**
Be mindful of what you write, the report will be part of the formal documentation set of the project.
- **Celebrate your successes.**
It is important to document what is working and give recognition where it belongs.
- **Balance structure with flexibility.**
After you start using the report, try to keep it consistent, but also apply changes when necessary, so the report is always useful to yourself and to your supervisor/client/team. The report should work for you, instead of you working for the report.
- **Have fun and be creative.**
Reporting can be a creative process. There are many ways you can choose to showcase information. Explore visual components and different reporting flows for clear and useful communication.

Remember: You can (and should) complement your report with other forms of communication (e.g. formal and informal meeting, emails, etc.). Also, structured reporting doesn't work for every research project situation. The key is to value communication and mindfully choose a communication strategy that works for your project.

CRICH Survey Research Unit – Providing high quality and efficient research and evaluation services to the health and social sciences community.



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