

Members of the Team,

Our DOE program manager has reviewed the reporting format for Technical Status reports and has requested the following changes. I have discussed these with him and considering the large number of projects that are being reported on, believe that the changes make sense and will make our report preparation easier. These reports, plus an annual program review presentation (20-30 minutes per project?) are the primary mechanisms at our disposal to communicate the progress and results of this important body of research to the people who provide the funding. With budgets being scrutinized on an ongoing basis, it is critically important that we use this opportunity to clearly communicate what we are doing, the progress that is being made, and build "market expectations" for the forthcoming results. The following format changes should be applied to all monthly and quarterly reports from now through the conclusion of the project.

The technical status reports contain the following 7 sections plus the schedule table:

1. Project Objective
2. Background
3. Progress and Status
4. Patents
5. Publications / Presentations
6. Schedule Status
7. Plans for Next Month or Quarter

Previously provided instructions for completing Sections 1, 2, 4, and 5 remain unchanged.

For Sections 3 (Progress and Status) and Section 7 (Plans for Next Month or Quarter) we have simply been asked to format the material to match the Task numbers and Titles that appear in the Schedule Table. For Example,

Section 3. Progress and Status. This section of the report describes the activities performed during the reporting period by the University of XYZ as well as by the industry cost share partners. Progress is reported relative to the approved tasks identified in the Statement of Work.

Task 1. Casting Research

Task 1.1 Literature Search. During the reporting period a literature search encompassing..... was conducted and completed. The search resulted in ..... that is relevant to the project because ... This task is now completed.

Task 1.2 Task Title (from SOW). During the reporting period meetings were held with industry partners ABC Inc., DEF Inc, and XYZ Ltd which validated that .... ABC Inc has provided ... equipment and has ordered materials including ... that will be used for casting trials

Task 1.3 Task Title and appropriate text

Task 1.4 Task Title and appropriate text

Etc.

Section 7. Plans for Next Quarter. This section of the report identify activities to be performed during the next quarter. Plans

are reported relative to the approved tasks identified in the Statement of Work.

Task 1. Casting Research

Task 1.1 Literature Search. Task completed.

Task 1.2 Task Title (from SOW). Finalize plans with ABC Inc to conduct casting trials that will address ...

Task 1.3 Task Title and appropriate text.

Task 1.4 Task Title and appropriate text

Etc.

Schedule Table: This table should be updated to reflect the revised due dates in the "Original Planned" column that was provided (or will be provided) in the updated Detailed Project Plans. This information should be provided in the format MM/YYYY (e.g., Nov 2004) rather than as "3 months from start". For all tasks that have started, information should be provided in the Percent Complete column. Text must be provided in Sections 3 and 7 for every task that has an entry in the Percent Complete column. The "Revised Planned" will remain blank unless your re-baseline schedule changes in the future. The "Actual" column should be filled in with a date in the format MM/YYYY when the task has been completed. Please keep all comments in the "Progress Notes" column very brief (3-5 words) and use Section 6. Schedule Status to provide text to describe the change or update. Again, please report in this section relative to the Task Number and Title using the same format as that in Sections 3 and 7.

As a general note, any time an activity is referred to that includes industry/cost share partners, please list the name of the partner organization and the time frame in which the activity took place. For example, "During December, casting trials testing .... were initiated at XYZ Ltd which are anticipated to show ..." rather than "Conducted trials at foundry."

The E-SMARRT web reporting tools were made fully operational in December. Please use the site ( <http://www.e-smarrrt.org/> ) to post all reports. Please assist us in maintaining the integrity of the site security by requesting individual accounts for all students, staff, and researchers who need access to post reports. As with any secure information, sharing your login and password information is never a good practice. If you need assistance with posting to the site, let me know. It only takes a few minutes to walk through the process over the phone.

If you have any questions regarding the project, please don't hesitate to contact me.

Best regards,  
Thornton White

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