



PAHO Guide for Writing a Progress (Interim) Report

PAHO/WHO Communicable-Disease Research Program

Communicable Disease Unit

Health Surveillance and Disease Management Area

Washington, DC, February 2004



The investigator is required to submit a progress report by the date specified in the final timetable of activities. As a rule, that date will be halfway through project implementation, beginning once the first disbursement is made. The interim report needs to describe the progress made to date in the research, how closely the work carried out reflects the workplan, how the proposed methods are being implemented, how the expenditures made comply with the project budget, and any efforts made in coordinating research tasks. The report should not be longer than ten, single-spaced, letter-size pages.

The following points will help guide the researcher in the preparation of the progress report:

1. Project Coordination and Execution

Review the original proposal and state any changes that have been made. The report should tell whether the original principal investigator and any associate or assistant investigators remain with the project. Explanations of any changes must be provided. If the principal investigator has been changed, the responsible institution needs to attach the pertinent official communication to the report. In addition, the new candidate's *curriculum vitae* needs to be submitted for approval.

2. Project Objectives and Goals; Research Methodology

Review the original protocol and report any changes that have occurred. A summary should be provided of the research objectives, goals, and methodology, as well as the project's expected duration, as approved and described in the grant award contract, including the date of initiation, generally defined as the date of the first disbursement of funds:

- If the research design has remained unchanged, the investigator should indicate that fact, noting that the objectives and methodological components as originally proposed have not been altered.
- If there have been changes, however, these changes and their possible consequences and implications for the research need to be clearly described and justified. Arguments attempting to justify changes based on lack of funds are not likely to be accepted.

3. Fulfillment of the Timetable

The original timetable for the research should be attached, along with a copy of any revised timetable, accompanied by an explanation of the changes that were made. According to the approved timetable, by the time the report is written, included should be a description of the programmed activities that were carried out as well as any programmed activities that were not carried out. In the latter case, an explanation must be extended. Explanations blaming lack of funds for the changes are not likely to be accepted.

4. Budgetary Disbursement and List of Expenditures

The report should outline the budgetary execution, using the categories provided to program the budget. A list of expenses should be attached, along with the corresponding support documentation and receipts.

5. Conclusions and Interim Proposals

Under this heading, the principal investigator should discuss the current status of the project, the results obtained by the time of the report, and any achievements, constraints, and setbacks. This information should be followed by the principal investigator's proposed solutions to the problems identified, and any recommended changes in the terms agreed upon in the grant award contract to be submitted for consideration to PAHO.