

Design Project Progress Review: Meetings and Memos

Periodically your group should have a formal design review meeting. These meetings are primarily for project management not technical review. (Although at times, technical issues must be settled to move on.) These meetings will consist of two parts;

1. Design Task Summary – in this part you will review the previous periods work
2. Design Objectives – in this part you will plan tasks and responsibilities for the next stage of the project

Because these memos are short and mostly consist of bulleted lists, they have their own format and do not follow the general format we have used for technical memos. A specific objective section is not necessary because their objective is clearly to report on and manage the projects progress. Also because they are short (generally between 1 and 2 pages) they do not require a summary. Although an introductory paragraph can be used. They should simply have the two sections described below.

Design Task Summary

A summary portion of the meeting is to keep everyone informed of your progress. It is way of summarizing:

1. What has been accomplished.
2. What unexpected problems have been encountered.
3. How the project is progressing and how this compares to the overall project plan.
4. Where specific information is documented.

For your first review meeting review simply your performance to your planned schedule.

For subsequent review meetings the previous design tasks (see the sections below) should be the starting point for your summary. Each design deliverable or action item that should have been completed in the project period (the time since your last formal project review meeting) must be addressed. For each completed item briefly summarize major results and a deliverable reference where the details can be found. For each item that is incomplete, its current status must be reported.

This is not a place to present excuses for why a deadline was missed. If a deadline was missed because of some fact or event that will continue to affect the project, then report that event or fact. Note when tasks were not completed because they were no longer important. Otherwise simply note when the task will be completed.

In the first paragraph of this section you must call attention to any items that are unusual, off-track, or have a large effect on project direction. The rest of the memo should simply follow the objectives memo listing the current status of each objective and action item.

Design Tasks: Deliverables & Action Items

The purpose of this portion of the meeting and the memo that documents it, is to make sure that:

1. We agree on what has to get done.
2. We understand what pieces of the work are ours.
3. We understand how our pieces relate to the whole.
4. We agree on the expected timing and importance our work.

You are developing a list of tasks and who is the primary person responsible for them. These tasks can be divided into two types: tasks resulting in *deliverables* and *action items*.

Deliverables

Deliverables are concrete items which document that work has been completed. Examples include reports, memos, drawings, calculations, and completed construction. Your deliverables may be memos summarizing specific design work. For each deliverable item you must define the nature of the deliverable item, the primary person responsible (PPR) to see that the task is to be completed, the date the deliverable is expected and the priority.

The nature of the deliverable item includes what physical item is to be delivered (memo, drawing, part...) and a clear description of the item. For each item there must be **one and only one** primary person responsible. This person is to insure that the work is completed. This does not mean that they are the only person who will work on the task. If you desire you may also define who else will be working with the PPR. Priority may change as the project progresses. A common prioritization system is:

- A - Necessary work, need as soon as possible, at least by date
- B - Necessary work, need by date listed
- C - Useful but not necessary work (yet); do as time allows.

Action items

Action items are things that require effort but that don't need extensive documentation. Usually they only take a few minutes, but they must happen. A group should keep a list of these with PPR and anticipated completion date. Several of these items usually crop up at any group meeting so keep the list handy. An example of an action item might be reserving a room for a mid-week meeting.

The design tasks portion of the memo lists the deliverables and action items your group has agreed upon including a clear description of the primary person responsible, the expected completion date and the priority for deliverables. In addition this memo should include an update of the overall project schedule (i.e., and updated GANTT chart). Below is an example of items that should be included in the memo.

Deliverables

1. A memo with result of a literature search for alternative thermal oxidation methods. Search should include a list of possible vendors, and brief process description of the methods described in the literature. Results are needed to help identify process alternatives.
PPR - PF Need by: 3/30 Priority - A
2. A memo describing methods for optimizing thermal oxidation reactors. Results can decrease capital cost if a thermal oxidation reactor is selected and if time is available to do a detailed design.
PPR - ZF Need by: 4/15 Priority - C

Action items:

	<u>PPR</u>	<u>Date</u>
1. Schedule final presentation	MM	4/15
2. Bring doughnuts to next meeting	SM	3/28