



District 7 Auxiliary Policy Letter 002/25(A)

15 April 2025

To: All District 7 Elected and Appointed Leaders

Subject: Monthly/Quarterly Reporting

Discussion

Periodic reporting of our accomplishments, upcoming opportunities, and current challenges is an important component of establishing and maintaining communication within our Chain of Leadership and Management. As such, our monthly and quarterly reporting tasks are a vital mechanism for recognizing dedicated performance, inviting collaboration and communication among our District 7 units, and facilitating resolution of identified issues and challenges.

Effective 01 January 2025, the formats and reporting schedule contained within this Policy Letter will be used by all District 7 unit and appointed leaders for their monthly and quarterly reports.

Report Types by Month

Monthly reports are due in January, February, April, May, July, August, October, and November. Monthly reports cover activities for the previous month.

Quarterly reports are due in March, June, September, and December. Quarterly reports should cover activities for the preceding three-month period, with the exception of the December quarterly report, which should include a summary of the entire year.

Month	Report Type	Period Covered
January	Monthly	Activities in December of the Previous Year
February	Monthly	Activities in January
March	Quarterly	Activities in December through February
April	Monthly	Activities in March
May	Monthly	Activities in April
June	Quarterly	Activities in March through May
July	Monthly	Activities in June
August	Monthly	Activities in July
September	Quarterly	Activities in June through August
October	Monthly	Activities in September
November	Monthly	Activities in October
December	Quarterly	Activities in September through November / Annual Summary

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Monthly Report Format

Name/Position: XXXXX XXXXXX / XXX-XX

Reporting Period: Month/Year

Unit/AOR/Program Area: XXXXXXXXXXXXX

Accomplishments:

- List a summary of specific accomplishments of units, program areas, and members. What did your Flotilla/Division/District Office do well? Give specific examples.
- Highlight specific contributions/progress to objectives listed in the D7 Operational Plan. How did your team's work help meet unit and District goals?

Opportunities:

- List upcoming opportunities for the unit, program area, or AOR (should be forward-looking). What is your focus for future projects, events, or goals?
- Identify new focus areas/objectives for District efforts. What new things could your team do and what support do you need to improve your Flotilla/Division/Program Area/AOR/District?

Challenges:

- List current gaps or issues that prevent mission/program accomplishment or that impact member satisfaction and engagement. What problems or obstacles are your Flotilla/Division/Program Area/AOR facing?
- Identify areas where procedural guidance is inadequate or not available. Are there any rules or procedures that are unclear or unhelpful? Propose solutions to existing gaps and issues. How can we fix identified problems?

Summary/Comments (Optional):

List any other items that need further explanation or that don't fit into one of the above categories.

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Quarterly Report Format

Name/Position: XXXXX XXXXXX / XXX-XX

Reporting Period: Quarter/Year

Unit/AOR/Program Area: XXXXXXXXXXXXX

1. Executive Summary:

- Provide a brief summary of all areas of the report, highlighting specific accomplishments, opportunities, and challenges.

2. Support of the District Strategic Plan:

- Describe progress toward specific Flotilla/Division/Program Area/AOR/District goals (see the District Strategic Plan for information on goals and objectives).
- Tell us about your successes, big and small.
- Share your wins and their stories.

3. Accomplishments in Recruiting and Retention:

- List progress and accomplishments toward specific goals concerning new member recruiting and member development (certifications and qualifications).
- Describe programs, initiatives, and/or new ideas that have positively impacted recruiting and retention.
- Provide specific data on number of new members, number of disenrollments, and percentage of members in AP status.

4. Program/Department Activities, Events, Projects, and Performance:

- List successful activities and events and provide best practices when appropriate.
- Describe significant projects, their status, partners, and expected outcomes.
- Highlight significant performance of units, programs, missions, and members.
- Share new approaches and practices for advancing District missions and programs.

5. Problems, Issues, Concerns and Suggested Solutions

- List current gaps or issues that prevent mission/program accomplishment or that impact member satisfaction and engagement.
- Describe current problems or concerns or those that may emerge in the near future.
- Explain obstacles to goals and objectives.
- Identify areas where procedural guidance is inadequate or not available.
- Propose solutions to gaps, issues, problems, and/or concerns.

6. Action Items:

- List open action items and specific plans to address them.

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7. Assistance Needed from Coast Guard, EXCOM, National Staff, NEXCOM:

- List any assistance needed from Coast Guard Units/Stations/Sectors, District Leadership/EXCOM, National Staff, and/or NEXCOM to accomplish Auxiliary missions and programs.

8. Next Quarter's Plans and Milestones:

- List significant upcoming events and activities.
- Describe significant plans, milestones, and objectives for the next quarter.

Reporting Schedule

Reports from the District Chief of Staff (DCOS) and District Captains (DCAPTs) are due to the District Commodore (DCO) by the 20th of each month. Recommended report due dates for different organizational levels are listed below:

Elected Officer Reports:

10th of the month: Flotilla Commander reports to Division Commanders

15th of the month: Division Commander reports to DCAPTs

20th of the month: DCAPT reports to DCO

Staff Officer Reports:

5th of the month: Flotilla Staff Officer reports to Division Staff Officers

8th of the month: Division Staff Officer reports to Assistant District Staff Officers

12th of the month: Assistant District Staff Officers reports to District Staff Officers

15th of the month: District Staff Officer reports to District Directorate Chiefs

18th of the month: District Directorate Chief reports to DCOS

20th of the month: DCOS report to DCO



Martin S. Goodwin

District Commodore

Seventh District Coast Guard Auxiliary