



REPORTS.

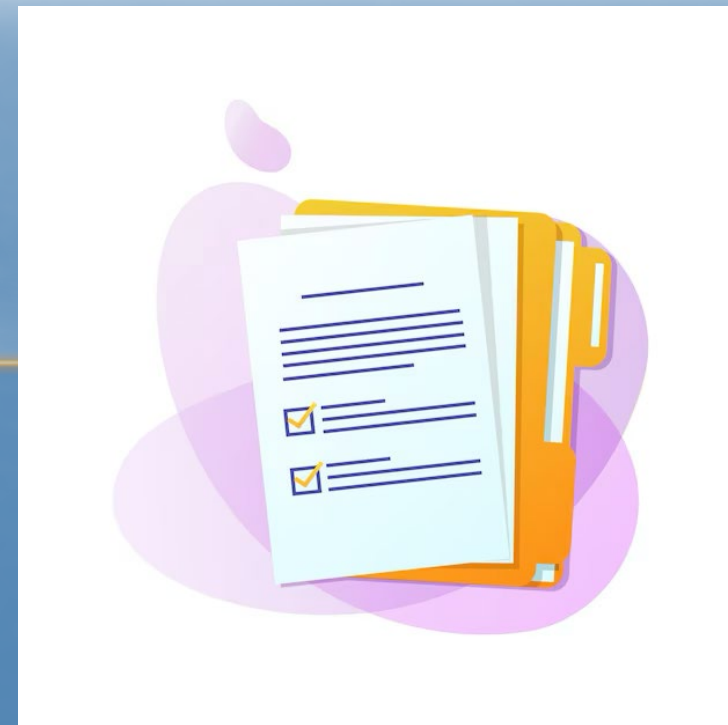
Who gets them?

What reports?

When are they due?

Where do they go?

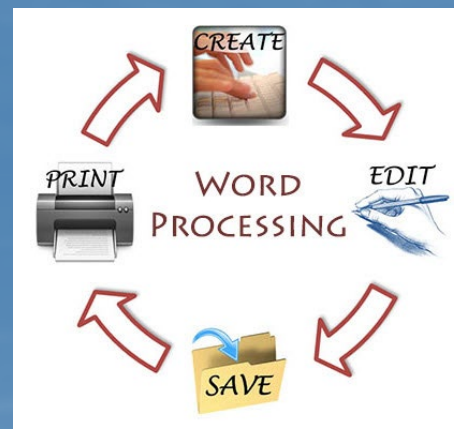
Why do we do them?





TIPS.

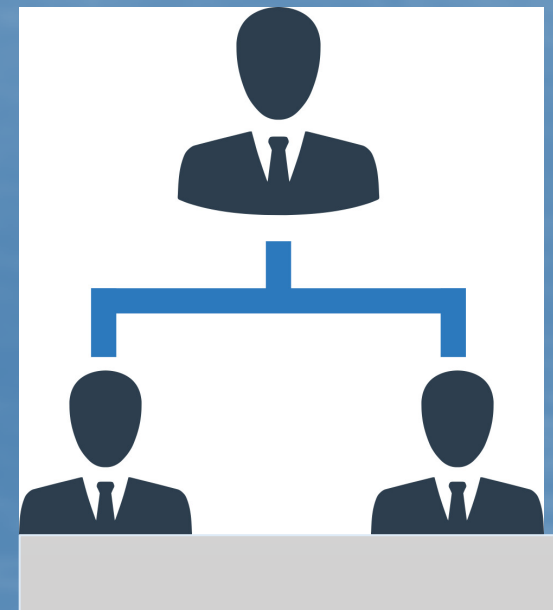
- **Save your monthly report in a word processing program. This will be your template for future reports.**
- **Each month update the month and fill in this month's key points.**
- **Save a copy as a PDF file as this is easier for emailing and storing.**





WHAT IS COMMON IN ALL REPORTS.

- Let's look at what is common in all reports.
- All reports must be submitted both monthly and quarterly.
- Each report goes up the next level in the Chain of Leadership and Management (COLM), for broader visibility and continuity.
- Content includes:
 - Key accomplishments.
 - Significant activities.
 - Challenges or needs.
 - Upcoming plans or goals.
 - Any items requiring assistance or attention.





LET'S GET STARTED WITH ELECTED OFFICERS.

FLOTILLA COMMANDER (FC).

- Flotilla Commander responsibilities:
- Submit monthly and quarterly reports.
- Due by the 10th of each month to your Division Commander.
- Email is the preferred method of submission.
- These reports help Division Commanders support flotilla programs and are forwarded through the COLM to assist policy makers.





DIVISION COMMANDER (DCDR).

- **Submit monthly and quarterly reports.**
- **Reports are due by the 15th of the month to your District Captain (DCAPT).**
- **Email is the preferred method of submission.**
- **Purpose: To inform the District and COLM about Division missions and successes.**

Division Commander
(DCDR)





DISTRICT CAPTAIN (DCAPT).

- Monthly and quarterly reports.
- Due by the 20th of each month.
- Submit to the District Commodore (DCO).
- These reports help facilitate oversight and strategic planning at the district level.
- Ensures the DCO is informed on operational and leadership conditions.





DISTRICT CHIEF OF STAFF (DCOS).

- Your report is due by the 20th of the month.
- It goes to the District Commodore (DCO).
- Provides the District Commodore with a fully integrated report across all mission areas.
- Helps the DCO:
 - Understand the operational status and health of the entire district.
 - Identify cross-cutting issues or opportunities.
 - Prepare briefings for National leadership or major events.
 - Guide strategic planning and policy adjustments at the district level.



District Chief of
Staff (DCOS)





NEXT, WE WILL LOOK AT STAFF OFFICER REPORTS.

- Let's look at what is common in all reports.
- All reports must be submitted both monthly and quarterly.
- Some reports have two recipients.
- Content includes:
 - Key accomplishments.
 - Significant activities.
 - Challenges or needs.
 - Upcoming plans or goals.
 - Any items requiring assistance or attention.





FLOTILLA STAFF OFFICER (FSO).

- Flotilla Staff Officers (FSOs) in any mission area (e.g., FSO-MT, FSO-HR, FSO-PA, etc.)
- Due by the 5th of each month.
- Where do the reports go:
- Flotilla Vice Commander (VFC) – to keep flotilla leadership informed.
- Division Staff Officer (SO) for your mission area – to contribute to division-level reporting and coordination.
- Helps both flotilla and division leadership understand:
 - What's been accomplished.
 - What challenges exist.
 - Where additional support or coordination may be needed.
- Ensures your efforts and needs are recognized and acted on as part of the broader mission success.

Flotilla Staff Officer



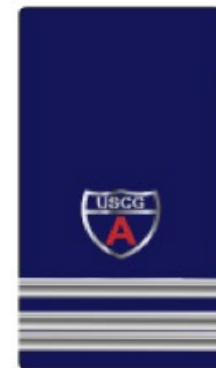


DIVISION STAFF OFFICER (SO).

- Division Staff Officers (SO) in any mission area (e.g., SO-MT, SO-HR, SO-PA, etc.)
- Due by the 8th of each month.
- Submit to Division Vice Commander (VDCR) – to keep division leadership informed.
- Assistant District Staff Office (ADSO) for your mission area – to contribute to district-level reporting and coordination.
- Helps both division and district leadership understand:
 - What's been accomplished.
 - What challenges exist.
 - Where additional support or coordination may be needed.
- Ensures your efforts and needs are recognized and acted on as part of the broader mission success.



Division
Staff Officer





ASSISTANT DISTRICT STAFF OFFICER (ADSO).

- Assistant District Staff Officers (ADSOs) in each mission area (e.g., ADSO-MT, ADSO-HR, ADSO-PA, etc.)
- Due by the 12th of each month.
- Your report goes to the District Staff Officer (DSO) for your mission area.
- Provides the DSO with updates on:
 - Division-level mission activities and progress.
 - Areas where support or guidance may be needed.
 - Trends that may require district-wide action or training.
- Supports effective district program management and alignment with national goals.

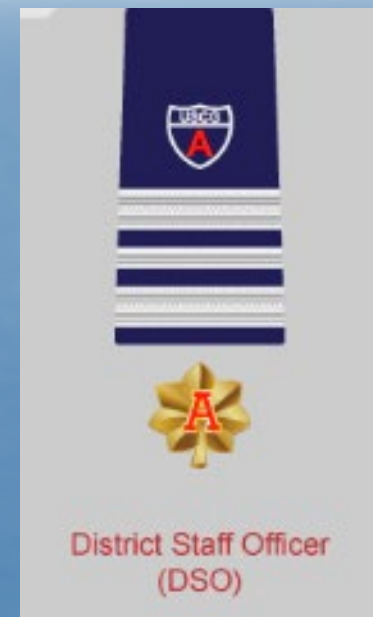


Assistant District Staff
Officer (ADSO)



DISTRICT STAFF OFFICER (DSO).

- District Staff Officers (DSOs) in each mission area (e.g., DSO-MT, DSO-HR, DSO-PA, etc.)
- Due by the 15th of each month.
- Your report goes to the District Directorate Chief (DDC) for your area of responsibility.
- Offers a district-wide overview of your mission area.
- Enables the DDC to:
 - Monitor performance across all units.
 - Identify trends, successes, and problem areas.
 - Advocate for support or resources if needed.
- Builds the foundation for district leadership to report effectively to national programs.





DISTRICT DIRECTORATE CHIEF (DDC).

- District Directorate Chiefs (DDCs) for each functional area (e.g., Response, Prevention, Logistics, etc.)
- Your report is due by the 18th of each month.
- Your report goes to the District Chief of Staff (DCOS).
- Consolidates mission area data from all District Staff Officers (DSOs).
- Enables the DCOS to:
 - Prepare a comprehensive operational overview of the entire district.
 - Spot issues or patterns across multiple mission areas.
 - Coordinate high-level responses and resource allocation.
- Essential for preparing leadership briefings and forwarding information up to the Commodore and National leadership.





WHAT GOES IN THE REPORTS?

- Your report will contain the highs and lows for the reporting period.
- You can also let them know what your plans are going forward.
- If nothing happened, just a simple
- “ No Report” will do.





ALSO:

- **Your report should also contain any information that you wish passed up the Chain of Leadership and Management (COLM).**
- **The more information that is passed along, at all levels, the better recognition and problem solving can be.**





SAMPLE REPORT FORMATS: MONTHLY.

District 7 Monthly Report

Name/Position: XXXXX XXXXXX / XXX-XX

Reporting Period: Month/Year

Unit/AOR/Program Area: XXXXXXXXXXXX

Use bulleted lists where possible for the prompts below:

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.

Reports





SAMPLE REPORT FORMATS: QUARTERLY.

District 7 Quarterly Report

Name/Position: XXXXX XXXXXX / XXX-XX

Reporting Period: Quarter/Year

Unit/AOR/Program Area: XXXXXXXXXXXX

Use bulleted lists where possible for the prompts below:

1. Current Progress Relative to District Operations Plan and Contingency Plans:

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

2. 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.

3. 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.

4. 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.

5. Action Items:

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

District 7 Quarterly Report

6. 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.

7. Next Quarter's Plans and Milestones:

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





SUMMARY.

- By now you know who gets your report.
- What reports to submit.
- When they are due, and the importance of the timeline.
- Where you send your report.
- Hopefully, you now understand the why.





THANK YOU FROM YOUR DISTRICT MEMBER TRAINING TEAM.

- Please refer to policy letter 002/25A from Commodore Goodwin dated 15 April 2025 for more information.
- Contact your COLM for more guidance.

