Reporting Expectations & Overview
Play Unified. Learn Unified.

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Overview: The following step-by-step guide provides an overview of the SNF reporting process and outlines the ways in which SOI, Regional and Program staff collaborate in accomplishing the monthly reporting for this project.

Before approaching the SNF reporting, Program staff should identify the systems, tools and resources needed to submit complete and timely reports.

Identify the systems needed to:
- collect and store event and/or participant information throughout the month
- transfer collected information to the monthly report
- communicate and coordinate between Regional and Program staff to enhance reporting

Identify the tools needed to capture local participation and engagement (i.e. Data Excel file, Attendance/Registration list, Reporting Calendar, Meeting Agenda, Photo Storage etc.)
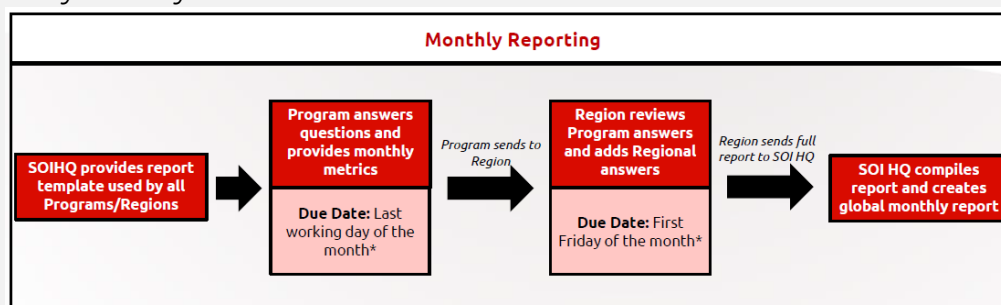
STEP 1:
Preplanning

STEP 2:
Submitting Monthly Reports

Each month SOI staff will forward a ***monthly report template** to the Regional Managers. This template will include information pulled from the Program Project Plan (i.e. anticipated accomplishments for the corresponding month and ***impact measure** goals).

Program and Regional Staff will then work together to submit the monthly report to SOI by the first Friday of every month.

Monthly Reporting

| SOIHQ provides report template used by all Programs/Regions | → | Program answers questions and provides monthly metrics — **Due Date:** Last working day of the month* | *Program sends to Region* → | Region reviews Program answers and adds Regional answers — **Due Date:** First Friday of the month* | *Region sends full report to SOI HQ* → | SOI HQ compiles report and creates global monthly report |

Accessing information from the reporting systems and tools will aid in describing all of the activity coordinated for the month. Including additional context, detailed language and descriptions of the steps that led to the monthly activity helps to communicate the progress made each month.

Types of additional context to include in your report:

- Cultural Context *(i.e. local occurrences that either supported progress or presented a challenge that was navigated)*

- Schools Details *(i.e. grade-level, school model)*

- Information and Lessons learned

- Emerging Needs *(i.e. technical support or resources)*

- Resources and Strategies that made the work easier

- Event Details *(i.e. location, type of sport, # and type of attendees)*

*Reporting Templates: SOI created three templates (monthly, mid-term and final report templates) to assist with the reporting for this project
*Impact Measures: There are 11 areas of impact that will be measured throughout this project. These areas are outlined in the Impact Measures Glossary.

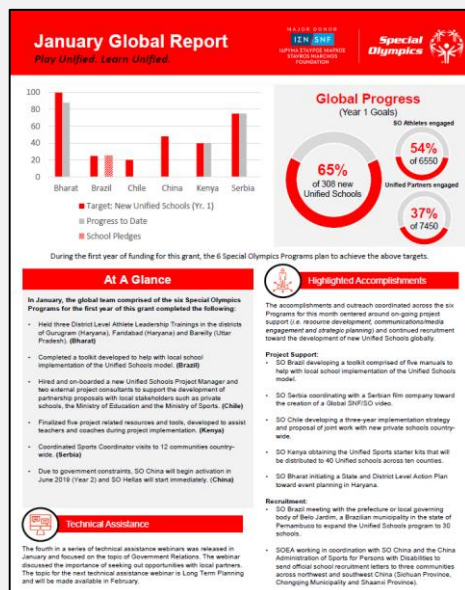# Reporting Expectations & Overview
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STEP 3:

Providing Reporting Support

After the report is emailed by the Regional Manager, SOI will draft Global and Program reports based on the information submitted by each Program.

The Global and Program reports:
- provide a snapshot of Program and Global progress toward yearly goals
- and highlight specific details regarding national implementation.

If there are questions, SOI will follow-up with the Regional Manager. Program staff should be responsive during these times, in the event that more information is needed.

Once the drafted report has been reviewed and finalized it can be shared. Please consider how and with whom you will share the Global and Program reports.

The Global and Program reports can shared with:
- Local partners and supporters to highlight progress
- Youth, teachers, coaches and other school staff to spread awareness
- Local audiences to demonstrate ways to support the movement

STEP 4:

Sharing Reports

STEP 5:

Preparing for Mid-Term and Final Reports

For this project, 12 reports will be submitted between June 2019 and May 2020. Program staff can begin preparing for these reports by understanding the three report types and the information captured in each. Listed below is a brief comparison of the three reports.

	Monthly Reports	Mid-Term Report	Final Report
Frequency	10 Reports	1 Report	1 Report
Period of Performance	1 Month	June – November (6 months)	December-May (12 Months)
Primary Report Components	Programmatic Updates	Programmatic & Financial Updates	Programmatic & Financial Updates
Specific Report Content	• Monthly Accomplishments • Barriers to Success • Changes to the Project Plan	• Project Milestones • Highlighted partnerships, schools and/or events • Barriers to Success	• Project Milestones • Highlighted partnerships, schools and/or events • Barriers to Success

Please note: Financial information is only requested within the Mid-Term and Final Reports.