



MAR 07 2013

COMDTINST 1800.5G

COMMANDANT INSTRUCTION 1800.5G

Subj: COAST GUARD RETIREE SERVICES PROGRAM

- Ref:
- (a) Title 5, United States Code, Section 552a
  - (b) Privacy Act Incident Response, Notification, and Reporting Procedures for Personally Identifiable Information (PII), COMDTINST 5260.5 (series)
  - (c) Preseparation Counseling, COMDTINST 1900.1 (series)
  - (d) Transition Assistance Program, COMDTINST 1900.2 (series)
  - (e) Operating Procedures for Work-Life Staffs, COMDTINST 5400.20 (series)
  - (f) Military Separations, COMDTINST M1000.4 (series)
  - (g) Military Casualties and Decedent Affairs, COMDTINST M1770.9 (series)
  - (h) Coast Guard Morale, Well-Being, and Recreation Manual, COMDTINST M1710.13 (series)
  - (i) Coast Guard Pay Manual, COMDTINST M7220.29 (series)
  - (j) DoD Financial Management Regulation (DoD FMR), Volume 7B, Chapters 42 – 58
  - (k) Legal Assistance Program, COMDTINST 5801.4 (series)

1. **PURPOSE.** This Instruction establishes and describes Coast Guard policy concerning the scope, responsibilities, and administration of the Coast Guard retiree services program. The Instruction defines the assignment of responsibilities for retiree services support. It also revises the policy regarding the operation of the Commandant of the Coast Guard National Retiree Council (CCGNRC) and Regional Retiree Councils by describing the organizational relationship between the Coast Guard and these councils.
2. **ACTION.** All Coast Guard unit commanders, commanding officers, officers-in-charge, deputy/assistant commandants, and chiefs of headquarters staff elements will comply with the provisions of this Instruction. The success of the Coast Guard retiree services program depends on those directly involved, as well as those in positions of Coast Guard leadership who must lend their personal attention and support to this program. Internet release is authorized.

DISTRIBUTION – SDL No. 162

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NON-STANDARD DISTRIBUTION:

3. DIRECTIVES AFFECTED. Commandant of the Coast Guard National Retiree Council Program, COMDTINST 1800.5F, is cancelled.
4. BACKGROUND. The Coast Guard's core values of Honor, Respect, and Devotion to Duty impose on the service and its members a responsibility to care for all members of the Coast Guard family. Our retirees are forever part of our Coast Guard family, the "long blue line." By tradition and law, retired Coast Guard members are individuals with a continuing military status. All retirees, including their family members and survivors, are entitled to certain rights, benefits, and privileges and are subject to responsibilities arising from these entitlements. Additionally, military retirees not on the temporary disability retired list (TDRL) or permanent disability retired list (PDRL) may be subject to recall at the discretion of the President. Retirees, as part of the total Coast Guard force, remain capable of making life-long contributions to Coast Guard missions. To ensure their contributions continue, retirees must be kept apprised of changing programs, services, and policies. The retiree services program will serve Coast Guard military retirees and eligible surviving family members by proactively keeping the lines of communication open to provide regular retiree information, retiree benefits advice, and services, when needed. This Coast Guard retiree services program policy framework will provide the network and organizational structure that reinforces and provides mutual benefit between the Coast Guard and the Coast Guard military retiree community.
  - a. The Coast Guard military retiree community is defined as any:
    - (1) Regular (active duty) and Reserve retired members.
    - (2) Regular or Reserve retired on the TDRL or PDRL.
    - (3) Retirees who waive military retired pay in favor of a combined military and federal civilian retirement.
    - (4) Surviving spouses, whether in receipt of Survivor Benefit Plan (SBP) annuities, or not.
  - b. Although federal civilian retirement benefits are different and are administered by another agency, Coast Guard civilian retirees may maintain social links with the Coast Guard through association with a regional retiree council or established retiree services desk.
  - c. The Coast Guard Pay and Personnel Center, retiree and annuitant services (PPC-ras) provides information and customer assistance on retiree pay and benefits. The PPC-ras website is located at <http://www.uscg.mil/ppc/ras/>.
  - d. The CCGNRC was chartered in 1982. Its primary mission continues: to sustain open and positive lines of communication between the Commandant and the entire military retiree community through the Commandant's executive agent, the Director of Reserve and Military Personnel (CG-13). The CCGNRC website is located at <http://www.uscg.mil/retiree/cgncra.asp>.
  - e. Major Department of Defense (DoD) military installations provide a menu of services, programs, and information available to all military retirees, including the Coast Guard military retiree community. These retiree services or activities offices are required by their service policy to sponsor annual retiree seminars or retiree appreciation days, which provide for the wide dissemination of information and policies of concern to the services' retiree communities. All military services are encouraged to invite a broad representation

of their retiree community to each retiree seminar or retiree appreciation day. Generally, the Coast Guard does not host retiree seminars or retiree appreciation days, but will make every effort to promote Coast Guard military retiree community participation through the retiree services network.

5. DISCUSSION. The Coast Guard retiree services program consists of four principle elements:

- a. Establishment of a clearly defined (by zip code coverage) network of retiree services desks, organized by geographic areas of responsibility, and overseen by retiree volunteers. The responsibilities of the retiree services desk are generally described as follows:
  - (1) Provide regular referrals and information to the supported military retiree community regarding matters associated with retiree information, retiree benefits advice, and services, when needed. Guide them to the appropriate resource office and maintain a file or have access to reference materials of pertinent retiree information.
  - (2) Foster military service teamwork and increase program effectiveness through active development of close relationships with DoD military service retiree activity offices within the local geographical area. Keep abreast of local military events sponsored by DoD military services in the AOR.
  - (3) Serve as a communication link between supported Coast Guard military retiree community and the larger military community, in addition to other governmental agencies and military coalition members that provide assistance to retirees. Notify the supported retiree community of local DoD sponsored events, such as retiree appreciation days, or other activities of interest to the retiree community.
- b. The CCGNRC and membership within the regional retiree councils.
- c. Routine publication of the *Coast Guard/NOAA Retirees' newsletter* by Pay and Personnel Center (PPC).
- d. Collaboration with external agencies, including the Department of Veterans Affairs (DVA) and particularly with the DoD and DoD military services' retirement activities programs, to increase Coast Guard military retiree community participation in available services, such as seminars and retiree appreciation days at DoD military installations.

6. ORGANIZATION AND DUTIES

- a. Director, Reserve and Military Personnel (CG-13) shall:
  - (1) Serve as program director for the Coast Guard retiree services program.
  - (2) Resource and implement an enterprise-wide retiree services program, including the appropriate level of full-time personnel resources to manage the program and the designation of a program manager, responsible for the routine program management of the retiree services program.
  - (3) Coordinate execution of effective pre-retirement, transition, and post-retirement retiree services program requirements with the following policy, program, and technical authorities:

- (a) Director of Health, Safety, and Work-Life (CG-11), the Office of Work-Life (CG-111), and the Coast Guard Health, Safety, and Work-Life Service Center (HSWL SC).
  - (b) Coast Guard Personnel Service Center (PSC) and Coast Guard Pay and Personnel Center (PPC).
  - (c) Judge Advocate General and Chief Counsel (CG-094) acting through Legal and Defense Services (CG-094M).
- (4) Coordinate field level execution of the Coast Guard retiree services program at Bases and certain Training Centers, with the Director of Operational Logistics (DOL) and Force Readiness Command (FORCECOM).
  - (5) Oversee retiree services program strategic communications including multi-channel communications infrastructure needed to inform Coast Guard leaders, members, and military retiree community.
  - (6) In consultation with FORCECOM (FC-P), publish and maintain Commandant Publications (COMDTPUB) that will:
    - (a) Serve as the Coast Guard's retiree guide and single source of important retiree entitlement and benefits information.
    - (b) Serve as the Coast Guard's retiree services desk training guide for use by each retiree services desk.
  - (7) In consultation with FORCECOM (FC-T), evaluate, define, and prioritize both active duty retiree services coordinator and retiree services desk volunteer training needs and deliver standardized resource training kits across the enterprise.
  - (8) Re-design and maintain Commandant CG-13's retiree services program website to provide sufficient retiree information and ensure ease of access via the internet. Coordinate the retiree services program web information with other key stakeholders (including DoD military services' retirement activities)
  - (9) Serve as the Commandant's executive agent for the CCGNRC, acting as principal point of contact to support the CCGNRC, and be accountable for accurate, timely exchange of information between the CCGNRC co-chairs and the Commandant. The executive agent or a designated representative will participate in the CCGNRC annual meeting and communicate with the CCGNRC on matters relating to the performance of or potential changes in the retiree services program in advance of taking action.
  - (10) Provide appropriate level of budget, logistics (including space and equipment, as needed) and program support for the CCGNRC annual meeting, normally held in the spring in Washington, DC. Fund CCGNRC active duty retired recall orders for each co-chair for the duration of the annual meeting, (unless a co-chair is a current federal government employee), including travel and administrative expenses incurred. Publish the Coast Guard National Retiree Council annual meeting report on the CCGNRC website.
  - (11) Develop and implement a CCGNRC co-chair selection process that:

- (a) Solicits the military retiree community for CCGNRC co-chair candidates.
  - (b) Recommends candidates to the Commandant for selection and announces the results.
- (12) Approve the establishment or extension of chartered regional retiree councils at Bases and certain Training Centers that maintain an effective Coast Guard retiree services network that covers, and is responsive to, the Coast Guard military retiree community within the developed area of responsibility (AOR). Upon approval, issue a charter certificate
  - (13) Interact and coordinate activities with the other military services' retirement activities programs, the DoD, and the DVA that promote enterprise-wide uniformity. Use lessons learned from these relationships to increase Coast Guard retiree services program effectiveness.
  - (14) Implement retiree services program administrative metrics to measure program outreach success and employ standard process improvement, as needed. Establish and administer a retiree services desk-of-the-year award program. Conduct an assessment of the retiree services program every three years that coincides with the selection of the next CCGNRC co-chair(s).
  - (15) Establish accounts with the Defense Manpower Data Center (DMDC) to facilitate downloading retiree addresses via the retired address finder (RAF). Provide each retiree services desk with access to the retired address finder. The retired address finder will permit the retiree services desk to download retiree and surviving spouse addresses. These addresses will be used to disseminate information about upcoming events of interest to the military retiree community. Access to the retired address finder may only be authorized by Commandant (CG-13). Any request for information to be released outside of the Coast Guard must be cleared by the Privacy Act officer or the staff judge advocate at the local level. Personal contact information will be treated in accordance with reference (a). A suspected or confirmed breach/compromise will be reported in accordance with reference (b).
- b. Director of Health, Safety, and Work-Life (CG-11) shall:
- (1) Coordinate execution of effective pre-retirement, transition and post-retirement retiree service program policy, programs, and technical authority with Commandant (CG-111), the Health, Safety, and Work Life Service Center (HSWL SC), and field-level Health Safety and Work-life regional practices, including, but not limited to:
    - (a) Family transition support during pre-retirement, including pre-separation counseling, required by reference (c) and transition assistance, as described in reference (d).
    - (b) Work-life support, as described in reference (e).
- c. Coast Guard Personnel Service Center (PSC) shall:
- (1) Provide centralized personnel support services and expertise that exceed the individual unit responsibility and capacity including:
    - (a) Procedures concerning separations and retirements for all military personnel, in accordance with reference (f).

- (b) Retiree decedent affairs, as described in reference (g).
- d. Coast Guard Community Services Command (CSC) shall promote retiree patronage of morale, well-being, and recreation (MWR), programs as described in reference (h), as well as access to the Coast Guard Exchange System (CGES) and similar service, including the commissary system of the military services in DoD.
- e. Coast Guard Pay and Personnel Center (PPC) shall:
  - (1) Support enterprise-wide retiree services programs including, but not limited to:
    - (a) Publishing the *Coast Guard/NOAA Retirees' Newsletter*, the official national communication link between the Coast Guard and its military retiree community. The newsletter is a forum to keep Coast Guard retirees and their families informed on their rights and benefits, including legislative changes for retired pay.
    - (b) Deliver retired pay and benefits, as described in references (i) and (j), and publish and maintain the Survivor Benefit Plan (SBP) and the Reserve component SBP (RCSBP) guides.
- f. The Judge Advocate General, acting through Legal and Defense Services (CG-094M) shall, support execution of the retiree services program by providing legal assistance, as described in reference (k).
- g. Director of Operational Logistics (DOL) and Force Readiness Command (FORCECOM) shall, implement the retiree services program at Bases and certain Training Centers by establishing and supporting retiree services desks that will perform the duties and responsibilities set forth in this Instruction. Maintain an effective Coast Guard retiree services network that covers, and is responsive to, the Coast Guard military retiree community in the retiree services desk's developed area of responsibility (AOR).
- h. Sponsoring Base Commanders and certain Training Center Commanding Officers shall:
  - (1) Manage and oversee the Coast Guard retiree services program, as described in this Instruction, by establishing the retiree services desk, led by a retiree volunteer director and coordinated through a command designated active duty retiree services coordinator, performed collaterally. The retiree services desk will be primarily augmented by, and in partnership with, trained volunteers, including Coast Guard Auxiliarists.
  - (2) Solicit and appoint the retiree volunteer director using the appointment letter template provided in enclosure (1). The retiree volunteer director will normally serve a three year term, unless otherwise terminated. Consecutive appointments are authorized at the sponsoring command's discretion. Ensure retiree volunteer director signs an offer-to-volunteer-services letter, as shown in enclosure (2).
  - (3) Designate, in writing, an active duty retiree services coordinator, who will provide, as a collateral duty, direct support to the retiree volunteer director that ensures effective command management of the retiree services desk.
  - (4) Forward copies of the retiree volunteer director appointment and active duty retiree services coordinator designation letters to Commandant CG-13.

- (5) Based on local retiree services demand, provide administrative resources to meet level of retiree services operational requirements. This will normally consist of a work station with computer and telephone, office supplies, and printing and postal support. Volunteer access to Coast Guard computers/networks will be subject to the volunteers' eligibility to have a computer account using a logical access credential card.
  - (6) Request the establishment or extension of at least one chartered regional retiree council that will affiliate with the sponsoring command and retiree services desk to provide a venue to express ideas and suggestions regarding Coast Guard retiree services program. The sponsoring command will request the charter from Commandant (CG-13) via the chain of command. Upon approval of the sponsoring command's request, Commandant (CG-13) will issue a charter certificate.
  - (7) Promote close interaction and coordination between the retiree services desk and the local and enterprise-wide stakeholders.
- i. Active duty retiree services coordinators shall:
- (1) Coordinate the routine management and oversight of the retiree services desk as described in this Instruction, including close interaction and coordination with local and enterprise-wide stakeholders.
  - (2) Provide guidance, support, and training, in coordination with the retiree volunteer director, to retiree services volunteers. Establish and implement retiree services desk standard operating procedures (SOP), as provided by Commandant (CG-13).
  - (3) Arrange for the retiree volunteer director to meet with the command cadre quarterly and other unit representatives, as appropriate.
  - (4) Through the retiree volunteer director and the regional retiree council, solicit retiree volunteers to staff the retiree services desk, including Coast Guard Auxiliarists.
  - (5) Maintain and provide retiree services desk activity statistics to the command cadre on a quarterly basis. Consolidate routine retiree services desk/regional retiree council feedback and forward recommendations to Commandant (CG-13) through the sponsoring command by the end of January each year for consideration by the Commandants' National Retiree Council (CCGNRC) at its annual meeting. Reporting requirement details will be outlined in Commandant (CG-13)'s retiree services desk training guide.
- j. Retiree volunteer directors shall:
- (1) Conduct routine operation of the retiree services desk by providing services as described in subparagraph 5.a. of this Instruction.
  - (2) Collaborate with the Active Duty retiree services coordinator, including implementation of standard operating procedures, publication of volunteer schedules and retiree services desk activity reports. Employ the Commandant (CG-13) provided training necessary to operate the retiree services desk, including but not limited to, a volunteer training program. Ensure volunteers sign an offer-to-volunteer-services letter, as shown in enclosure (2).

- (3) Coordinate with Commandant (CG-13) to establish and maintain the DMDC retired address finder to facilitate downloading retiree addresses in accordance with DMDC protocols. The retired address finder will permit the retiree services desk to download retiree and surviving spouse addresses. These addresses will be used to disseminate information about upcoming events of interest to the military retiree community. This information must be appropriately safeguarded. Personal contact information will be treated in accordance with reference (a). A suspected or confirmed breach/compromise will be reported in accordance with reference (b).
- (4) Collaborate with the active duty retiree services coordinator to communicate, in an effective and timely manner, key military retiree community information impacting retirees within retiree services desk AOR.
- (5) Support and provide oversight to all chartered regional retiree councils within the retiree services desk AOR. Communicate retiree services desk activities, outreach, and volunteer opportunities with the chartered regional retiree council co-chairs. Participation in regional retiree council meetings is highly recommended.
- (6) Submit retiree information of national interest to PPC for possible inclusion in the *Coast Guard /NOAA Retirees' Newsletter*.

7. COMMANDANT'S NATIONAL RETIREE COUNCIL (CCGNRC) AND REGIONAL RETIREE COUNCILS.

a. CCGNRC shall be organized as follows:

- (1) Two national co-chairs (one retired flag officer, one retired master chief petty officer).
- (2) One designated representative of each sponsored regional retiree council, which will be normally a co-chair.
- (3) At-large members may be identified as agreed to between the co-chairs and the executive agent (i.e., SBP annuitant).

b. CCGNRC co-chairs shall:

- (1) Normally serve for a three-year term. Consecutive appointments may be recommended through the co-chair nomination, selection, and appointment process.
- (2) Represent the Coast Guard at annual meetings of the military service secretaries' retiree councils to provide input on matters of interest to the Coast Guard military retiree community.
- (3) Meet/communicate regularly with the executive agent to facilitate a mutually beneficial relationship between the Coast Guard and the military retiree community.

c. CCGNRC shall:

- (1) Represent their respective Coast Guard military retiree communities and inform appropriate Coast Guard leadership regarding retiree issues.
- (2) Support the two-way communications between the Coast Guard and the Coast Guard military retiree community.

- (3) Facilitate retiree volunteerism in support of Coast Guard active duty and retiree programs and events.
  - (4) Meet annually, normally in the spring, in Washington, DC. The annual meeting will normally include a retiree services briefing to the Vice Commandant and Commandant.
  - (5) Receive an annual update and provide feedback on matters pertaining to the Coast Guard retiree services program including, but not limited to:
    - (a) Quality assurance assessment of the retiree services program.
    - (b) Ongoing retiree services program changes and adjustments, including policy updates.
  - (6) Prepare and submit an annual report to the Commandant through the executive agent. The annual report may include information regarding the effectiveness of the retiree services program and improvements to retirement transition, pay, benefits, privileges, legislative, veterans' affairs, retiree quality of life, and other Coast Guard military retiree community matters.
- d. Regional retiree councils shall be organized as follows:
- (1) No more than two co-chairs (normally one retired officer, one retired chief petty officer).
  - (2) The regional retiree council co-chairs will be nominated from among the local military retiree community, approved and appointed by the supporting commander or commanding officer.
  - (3) The regional retiree council co-chairs may appoint committee leaders who have been nominated by the regional retiree council membership.
- e. Regional retiree councils shall:
- (1) Be clearly organized by retiree address zip codes so that all of the Coast Guard military retiree community is captured by the network of regional retiree councils.
  - (2) Establish membership that includes all definitions of the Coast Guard military retiree community, whenever possible.
  - (3) Include other retirees who have had some affiliation with the Coast Guard or DoD who seek membership within the regional retiree council.
  - (4) Meet a minimum of twice a calendar year to:
    - (a) Exchange ideas on matters concerning retiree entitlements.
    - (b) Consolidate support on issues that arise during the meetings.
    - (c) Coordinate the activities of council members to gather and provide information on matters of mutual concern.

- (d) Collaborate and make recommendations to the local retiree services desk and the CCGNRC.
  - (5) Prepare meeting minutes and submit them to the retiree services desk and the sponsoring command. The retiree services desk will forward minutes, if considered appropriate feedback, to Commandant (CG-13) in accordance with Paragraph 6.i.(5) of this Instruction.
  - (6) Provide input, via the co-chairs, on retiree services to their respective Coast Guard leaders at their appropriate levels and be facilitators of retiree volunteer support for the benefit of Coast Guard retiree and active duty programs.
  - (7) Meet by appropriate means. The common expectation is that such meetings rely on physical proximity, such as people in the same room at the same time. However, advances in communication technology make other meeting methods viable and reasonable. Meeting methods may include, but are not limited to, voice and video teleconference.
- f. Regional retiree council co-chairs shall:
- (1) Represent the Coast Guard military retiree community at the local retiree councils established by the other military services.
  - (2) Meet with the regional retiree council sponsoring commander or commanding officer annually.
8. RECORDS MANAGEMENT CONSIDERATIONS. This Instruction has been evaluated for potential records management impacts. The development of this Instruction has been thoroughly reviewed during the directives clearance process, and it has been determined there are no further records scheduling requirements, in accordance with Federal Records Act, 44 U.S.C. 3101 et seq., National Archives and Records Administration (NARA) requirements, and the Information and Life Cycle Management Manual, COMDTINST M5212.12 (series). This policy does not have any significant or substantial change to existing records management requirements.
9. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS.
- a. The development of this directive and the general policies contained within it have been thoroughly reviewed by the originating office and are categorically excluded under current USCG categorical exclusion (CE-1) from further environmental analysis, in accordance with Section 2.B.2. and Figure 2-1 of the National Environmental Policy Act Implementing Procedures and Policy for Considering Environmental Impacts, COMDTINST M16475.1 (series).
  - b. This directive will not have any of the following: significant cumulative impacts on the human environment; substantial controversy or substantial change to existing environmental conditions; or inconsistencies with any Federal, State, or local laws or administrative determinations relating to the environment. All future specific actions resulting from the general policies in this Manual must be individually evaluated for compliance with the National Environmental Policy Act (NEPA), Council on Environmental Policy NEPA regulations at 40 CFR Parts 1500-1508, DHS and Coast Guard NEPA policy, and compliance with all other environmental mandates.” Environmental considerations were examined in the development of this directive and have been determined to be not applicable.

10. FORMS/REPORTS. None.



MANSON K. BROWN  
Vice Admiral, U.S. Coast Guard  
Deputy Commandant for Mission Support

Encl: (1) Retiree Volunteer Director appointment letter template  
(2) Offer-to-volunteer-services template



**Retiree volunteer director appointment letter-template**

From: (sponsoring command)

To: (name and retired rank)

Subject: APPOINTMENT OF RETIREE VOLUNTEER DIRECTOR

Ref: (a) Coast Guard Retiree Services Program, COMDTINST 1800.5G

Dear (Jon Doe)

1. You are hereby appointed as the retiree volunteer director for this command's retiree services desk.
2. In the performance of your duties, you are guided by the contents of reference (a), section 6.j.(1) through (6).
3. The command active duty retiree services coordinator will schedule your quarterly meetings with me. Additionally, you are authorized direct liaison with the command as you deem necessary.

Commanding Officer Signature

Copy to: CG-13



**Offer-to-volunteer-services -template**

I, the undersigned, desire to volunteer my services to the Coast Guard retired services desk at (name of sponsoring command).

I expressly agree that such services are offered at no cost to the U.S. Government. I expect no present or future compensation as a result of the services I will perform under this agreement.

I understand that the performance of services under this agreement entitles me to no compensation, either in pay or benefits.

Retiree services desk volunteer \_\_\_\_\_ Date \_\_\_\_\_  
(sign)

Retiree volunteer director \_\_\_\_\_ Date \_\_\_\_\_  
(sign)

Active duty retiree services coordinator \_\_\_\_\_ Date \_\_\_\_\_  
(sign)

