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United States Coast Guard

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COMDTINST 7220.40  
JAN 13 1998

COMMANDANT INSTRUCTION 7220.40

Subj: COAST GUARD ENLISTMENT BONUS (EB) PROGRAM

Ref: (a) 37 U.S.C. ° 308a  
(b) Coast Guard Recruiting Manual, COMDTINST M1100.2C  
(c) Coast Guard Personnel Manual, COMDTINST M1000.6A  
(d) Allowable Weight Standards for the Health and Well-Being of Coast Guard Military Personnel, COMDTINST M1020.8C  
(e) Personnel and Pay Procedures Manual, HRSIC M1000.2(series)  
(f) Convening Schedule for Coast Guard Class "A" and "C" Resident and Exportable Training Courses, COMDTNOTE 1540  
(g) PMIS Forms Guide, PPCINST M5235.1

1. PURPOSE. In order to attract qualifying personnel to critical skills or ratings and help meet the Commandant's recruiting goals, this instruction establishes an Enlistment Bonus program for recruiting under the provisions of reference (a). This program applies to new enlistments.
2. ACTION. Area and district commanders, commanders of Maintenance and Logistics commands, commanding officers of Headquarters units, assistant commandants for directorates, chief counsel, and special staff officer at headquarters shall ensure compliance with this instruction's provisions.
3. DIRECTIVES AFFECTED. Enclosure (1) will be entered as change 1 to reference (b).
3. DISCUSSION. Reference (a) authorizes Commandant to establish a monetary bonus for personnel who agree to enlist in the Coast Guard for at least four years active duty in a skill designated as critical.
5. DEFINITIONS. For the purposes of this Instruction the

following definitions apply:

- a. **Critical Rating:** A rating which is understaffed, is projected to be understaffed in the future or requires an inordinate amount of training to achieve rating strength. The shortages are the result of the Service's inability to attract and retain personnel in the rating.
- b. **Obligated Service:** All periods of military service covered by signed agreements in the form of Enlistment Contracts, Reenlistment Contracts and or Agreements to Extend Enlistment between Coast Guard members and the U. S. Coast Guard in which members agree to serve for designated periods of time.
- c. **Unearned Bonus:** An Enlistment Bonus paid to a member who has not served the active duty time.

Example: A member enlists for four years and receives a \$2,000 payment. If the member is subsequently discharged due to misconduct after serving only two years, the member has earned only two years' worth of the Enlistment Bonus (\$1,000); the second two years' worth of Enlistment Bonus (\$1,000) is unearned and may be recouped.

## 6. POLICY.

- a. Commandant designates critical ratings. Based on current rating strength and workforce forecasts, Chief, Workforce Planning and Analysis Division (G-WR-2), determines which ratings are critical, may be placed on the guaranteed Class "A" school list or the guaranteed "Striker" list, and designated eligible for an Enlistment Bonus (EB). Workforce Planning and Analysis Division (G-WR-2) identifies critical/hard to fill ratings quarterly and updates as necessary.
- b. Enlistment Bonuses are linked to a member's recruitment and affiliation with a critical rating by attending the guaranteed Class "A" school or participating in a guaranteed "Striker" program in that rating or, for prior service personnel who already have the qualifying skill, agreeing to enlist in the designated rating. This program is not a substitute for a Selected Reenlistment Bonus (SRB). Former and current Coast Guard members are not eligible for an Enlistment Bonus.
- c. For those ratings where there is no Class "A" school and for which an Enlistment Bonus is established, a member may receive the bonus by qualifying for the rating through the "Striker" program established in reference. In these cases, special arrangements shall be made by Commander, Coast Guard Personnel Command (CGPC-epm) to assign members to appropriate commands with viable "Striker" programs in that rating.

- d. The Enlistment Bonus shall be paid in these periodic installments.
    - (1) When the total Enlistment Bonus is less than \$7,000, the Bonus will be paid in two (2) equal installments. For non-prior service members, the first bonus installment will be paid after successful completion of recruit training and the second installment on successful completion of Class "A" school, or being placed on the striker advancement eligibility list for eligible ratings that do not have an associated "A" school. For prior service members who already have the qualifying skill, the first installment will be paid on entry into the Coast Guard and the second after satisfactory service (e.g., no disqualifying conditions described in paragraph 8.b.) for six months in the designated rating.
    - (2) If the total Enlistment Bonus is greater than \$7,000, the maximum first installment will be \$7,000 and the remainder of the Bonus will be paid in equal monthly installments.
  - e. A member may receive only one of the following benefits or incentives: (1) Coast Guard College Fund, or (2) Enlistment Bonus Program. Other bonus payments upon graduation from selected Class "A" schools (currently being given to FS rating) are discontinued and superseded by this Program. Receiving an Enlistment Bonus does not affect eligibility for educational benefits pursuant to the Montgomery G.I. Bill (MGIB). A Selective Reenlistment Bonus (SRB) may not be paid for the same period of service for which an Enlistment Bonus (EB) is paid.
7. ELIGIBILITY CRITERIA. To qualify for the Enlistment Bonus Program, members must:
- a. Meet standard enlistment qualification criteria;
  - b. Qualify for and agree to affiliate with a selected rating or designated critical skill and agree to serve an initial active duty enlistment for a minimum of 4 years;
  - c. Enter active duty in the Coast Guard after 01 December 1997 but prior to 30 September 1998;

- d. Does not participate in the Coast Guard College Fund. Once a member chooses to participate in the Enlistment Bonus, he or she cannot change over to the College Fund.
8. LOSS OF ELIGIBILITY AND RECOUPMENT. All paid but unearned bonuses, as defined by paragraph 5, shall be recouped on a prorated basis as specified in this paragraph.
- a. Members who are disenrolled from the qualifying Class "A" school or assigned "striker" program, or otherwise fail to qualify in the rating for which they are paid the bonus shall have any paid but unearned portions of an Enlistment Bonus recouped on a prorated basis. Enlistment Bonuses will not be recouped for members who are disenrolled under the conditions established in paragraph 8.d. or who do not acquire the skill due to unforeseen service actions (e.g., cancelling "A" school or disestablishing the member's rating).
  - b. Members become ineligible for continued Enlistment Bonus payment on the date they no longer qualify or serve in the rating for which the Enlistment Bonus was authorized. Additionally, all paid but unearned Enlistment Bonuses shall be recouped on a prorated basis in these cases. A member will be considered not technically qualified in the bonus rating if for any reason within the member's control:
    - (1) The member no longer serves in the rating for which the bonus was authorized;
    - (2) The member's rating designator is removed; or
    - (3) Current and future assignment in that military specialty is precluded.
  - c. Unearned bonuses shall also be recouped if:
    - (1) The member is unable to perform the duties of the rating for which the bonus was paid due to injuries caused by his or her own misconduct;
    - (2) The member is unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to his or her fault, or
    - (3) The member refuses to perform the duties of the rating for which the bonus was paid.

- d.. Members who are discharged or change ratings prior to completing the period of service for which they were paid an enlistment bonus shall have a prorated share of all paid but unearned bonus recouped except:
    - (1) Members involuntarily discharged for the Convenience of the Government in connection with a reduction in force;
    - (2) Members who are separated or retired for physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct;
    - (3) Members who receive a dependency or hardship discharge;
    - (3) Members discharged early for the purpose of immediate reenlistment, provided they reenlist in the eligible rating and the reenlistment term is for a period longer than the obligated service remaining in the period for which an Enlistment Bonus was paid. For example, if a member separates before his or her normal end of enlistment to immediately reenlist, the money will not be recouped if the member extends or reenlists for a period at least longer than the amount of time the member had remaining at separation.
  - e. Personnel no longer classified or assigned to a general petty officer billet due to humanitarian reassignment, loss of security clearance not due to the member's fault, injury or illness through no fault of their own, will be entitled to their full bonus.
  - f. Members placed on weight probation in accordance with reference (d) shall have any unpaid Enlistment Bonus suspended until they comply with the Coast Guard's allowable weight standards.
9. PAYMENT AND RECOUPMENT PROCEDURES. The procedures to initiate payment and recoupment of the Enlistment Bonus will initially be published by Commanding Officer, Human Resources Services and Information Center (HRSIC) in an ALPERSRU. Subsequently, these procedures will be included in references (e) and (g).
- a. General Payment Procedures.
    - (1) Prior service personnel. The initial payment of the Enlistment Bonus to qualifying prior service personnel will be made on entry into the Coast Guard. Subsequent payments will begin on completion of six months active service automatically unless HRSIC is notified of unsatisfactory service

- (2) Non-prior service personnel. The initial payment of the Enlistment Bonus to qualifying non-prior service personnel will be made on successful completion of recruit training. Subsequent payments will begin on successful completion of "A" school, or being placed on the striker advancement eligibility list for eligible ratings that do not have an associated "A" school.
- c. Recoupment Procedures. When a member is no longer eligible for the Enlistment Bonus, HRSIC will recoup paid but unearned bonus portions based on the effective date documented by the member's command. Recoupment examples:
- (1) A prior service member enlisted for 4 years (48 months) on 20 December, 1997. On entry, the member was paid a \$1,000 installment of the Enlistment Bonus. Member was separated from the service due to his or her own misconduct on 1 March, 1998. Time not served is 3 years, 9 months and 18 days. The amount of Enlisted Bonus recouped would be \$950 based on  $(\$1,000/48 \text{ mos} = \$20.8333 \text{ per month} \times 45 \text{ months}) + (20.8333/30 \text{ days} = \$.6944 \text{ per day} \times 18 \text{ days})$ .
  - (2) A non-prior service member enlisted for 4 years (48 months) on 20 December, 1997 for FT school. On graduation from recruit training on 14 February, 1998, the member was paid a 4,000 Enlistment Bonus initial installment. The member entered FT "A" school on 1 November, 1998 and was disenrolled due to academic failure on 5 January, 1999. Time not served is 2 years, 11 months, and 14 days. The amount of Enlistment Bonus recouped would be \$2,955.55 based on  $(\$4,000/48 \text{ months} = \$83.3333 \text{ per month} \times 35 \text{ months}) + (\$104.1666/30 \text{ days} = \$2.7777 \text{ per day} \times 14 \text{ days})$ .

## 10. RESPONSIBILITIES.

- a. Commandant (G-WPM):
  - (1) Oversee Enlistment Bonus Program policy and resources;
  - (2) Promulgate and maintain a list of selected critical ratings eligible for Enlistment Bonuses;
  - (3) In consultation with Commandant (G-WR-2), direct the number of applicants who
  - (4) may be offered enlistment bonuses and bonus amount that may be offered for
  - (5) affiliation with each critical rating.
- b. Commandant (G-WR-2):
  - (1) Periodically review the list of ratings designated as critical for the purposes of this instruction and recommend which ratings shall be added or deleted from participation in the Enlistment Bonus program;

- (2) Provide an updated list to G-WPM with a copy to CGPC 15 days before the end of each Quarter. Changes to the list of ratings eligible for Enlistment Bonuses become effective on the first day of the month after G-WR-2's notification.
- c. Commanding Officer, Human Resources Services and Information Center (HRSIC):  
Establish and maintain a system for paying and recouping enlistment bonuses and publishes these procedures in reference (e).
- d. Commander, Coast Guard Personnel Command (CGPC-epm):
- (1) Apportion guaranteed "A" schools, including those for which an Enlistment Bonus' have been authorized by G-WPM, based on the availability of Class "A" school quotas listed in reference (f). CGPC-epm will balance the number of guaranteed Class "A" school quotas eligible for the Enlistment Bonus program with the number of quotas available to personnel already on the school waiting lists. CGPC-epm will publish Quarterly allocations seven days before the end each Quarter, and update as necessary.
  - (2) For members recruited into an eligible "Striker" program, upon graduation from recruit training CGPC- epm shall assign member PCS to an appropriate command with a viable "Striker" program in that rating. Coordinate assignment as needed to ensure receiving command has capacity to accommodate assignment within established personnel allowance.
- e. Director, Coast Guard Recruiting Center (CGRC):
- (1) Design and execute a marketing plan for the Coast Guard Enlistment Bonus Program as part of an overall effort to accomplish Coast Guard recruiting missions and goals;
  - (2) Ensure eligible members' enlistment contracts set forth the terms under which enlistment bonuses may be paid and recouped by completing enclosure (1) for each recipient of an Enlistment Bonus.
  - (3) Ensure a member enlisted under the Enlistment Bonus program is not also enlisted under the College Fund incentive program.

- (4) Provide by the fifth (5th) day of each month, a list of personnel recruited with an Enlistment Bonus. Provide each recipient's name, social security number, enlistment and shipping date, rating affiliation, basis for affiliation (e.g. guaranteed Class "A" school, guaranteed "Striker" program, or prior service with qualifying skills), and race/gender information [for measurement], and other pertinent identifying data. If a guaranteed Class "A" school, provide course convening date to which assigned. The original report will be submitted to CGPC with copies to G-WPM, G-WR-2, HRSIC (MAS), TRACEN Cape May (apr), ISC Cleveland (PERSRU), RTC Yorktown (PERSRU).
  - (5) Recommend reallocation of funds budgeted for the EB program to meet changes to the ratings designated eligible to receive EBs.
- f. Personnel Reporting Units (PERSRUS): Ensure necessary reports to HRSIC (SES) or appropriate PMIS/JUMPS entries are made to pay Enlistment Bonuses to eligible members and to recoup Enlistment Bonus payments on loss of eligibility.
  - g. Commands receiving members under the Enlistment Bonus as a guaranteed "Striker." Ensure member satisfies all requirements of the "Striker" program in accordance with reference (c). Members failing to make satisfactory progress may be disenrolled from the "Striker" program using standard criteria for unit "Striker" program administration. However, this period may not exceed two years from the date member graduated from recruit training. If the command disenrolls a member from the unit "Striker" program send message report with relevant dates and basis of disenrollment to CGPC-epm with copy to G-WPM, G-WR-2, and HRSIC (MAS).
10. FORMS/REPORTS. Enclosure (1), Form CG-3301T, shall be entered as change 1 to reference (b) and may be reproduced. Enclosure (1) documents the eligibility criteria and conditions under which an Enlistment Bonus is paid and is the source document to implementing pay actions through PMIS/JUMPS.

/s/ G. G. PICHE  
Director of Personnel Management

Encl: (1) CG-3301V, Annex T to COMDTINST M1100.2C

Coast Guard Recruiting Manual  
ANNEX T

STATEMENT OF UNDERSTANDING  
U. S. COAST GUARD ENLISTMENT BONUS

An original and three copies of this form shall be prepared. It will become an Annex to the Enlistment/Reenlistment Document, Armed Forces of the United States (DD-4).

Recruiting Office: \_\_\_\_\_ Date: \_\_\_\_\_

Prior to enlisting in the United States Coast Guard and receiving an Enlistment Bonus, I, \_\_\_\_\_ understand that:

1. I have been offered an Enlistment Bonus of \$ \_\_\_\_\_ to affiliate with the \_\_\_\_\_ rating. In order to affiliate with this rating, I have either been offered a Type I or Type II guaranteed school, or guaranteed enrollment to an eligible "Striker" program, or I am a prior service member who is already qualified in the skill/rating in accordance with eligibility criteria established by the Coast Guard.
2. I agree to enlist for four (4) years in the rating for which the bonus is paid. Therefore, if I am a prior service member with the qualifying skill or specialty, I will enlist in the eligible rating for at least four years or if I am a non-prior service member I will be assigned to Class "A" school or enrolled into a "Striker" program for the eligible rating identified above.
3. When the total Enlistment Bonus is less than \$7,000, then the Bonus will be paid in two (2) equal installments. If I am a non-prior service member, the first installment of the enlistment bonus will be paid after successful completion of recruit training Cape May and the second installment will be paid upon successful completion of Class "A" school or placement on the striker advancement eligibility list for eligible ratings that do not have an associated "A" school. If I am a prior service member who already has the qualifying skill, the first installment will be paid upon entry into the Coast Guard and the second installment will be paid after satisfactorily serving for six months in the designated rating. If the total Enlistment Bonus is greater than \$7,000, the first installment will not be greater than \$7,000 and the remainder of the Bonus will be paid in equal monthly installments.

ANNEX T (Cont'd)

DEPT. OF TRANSP., USCG, CG-3301V (6-97)

Figure 7-26

7-100

Coast Guard Recruiting Manual  
ANNEX T (Cont'd)

Figure 7-26 (Continued)  
Reverse of CG-3301V (6-97)

4. Commanding Officer, Training Center, may revoke this guarantee should I fail to progress satisfactorily during recruit training. Failure to progress satisfactorily is interpreted to mean failure to complete recruit training in accordance with established schedules due to academic, adaptability, or misconduct reasons. This guarantee is also contingent on my meeting all physical standards applicable for attending the "A" school or the "Striker" program.
5. Should I be convicted of a serious violation of the Uniform Code of Military Justice, this guarantee will be revoked.
6. Should I be disenrolled from the school identified in this statement of understanding for academic failure or misconduct, a prorated share of the bonus shall be recouped, I will not be guaranteed assignment to another school, and I will be required to complete my 4 years active duty commitment. If I am disenrolled from the aforementioned school or "Striker" program for any of the reasons contained in this statement of understanding, I will not necessarily be precluded from applying for future school assignment or "Striker" program per current regulations and policies.
7. I will become ineligible for continued payment of my Enlistment Bonus if I am no longer qualified in, or serving in, the rating identified in paragraph one (1). Further, all paid but unearned bonus will be recouped in these cases. I will be considered not technically qualified in the Bonus eligible rating when, for any reason within my control:
  - a. I am no longer serving in the rating;
  - b. My rating designator is removed; or
  - c. My current or future assignment in the military specialty is precluded.
8. Any paid but unearned bonuses shall also be recouped when:
  - a. I am unable to perform the duties of the rating for which the bonus was paid as result of injuries caused by my own fault.

ANNEX T (Cont'd)

DEPT. OF TRANSP., USCG, CG-3301V (6-97)

Figure 7-26 (Continued)

Coast Guard Recruiting Manual  
ANNEX T (Cont'd)

Reverse of CG-3301V (6-97)  
Figure 7-26 (Continued)

- b. I am unable to perform the duties of the rating for which the bonus was paid as a result of a loss of security clearance due to my own fault.
  - c. I refuse to perform the duties of the rating for which the bonus was paid.
9. If I am separated from the active duty Coast Guard, or change ratings, prior to completing the period of service for which the Enlistment Bonus was paid, a prorated share of all paid but unearned bonus shall be recouped except under the following circumstances:
- a. I am involuntarily discharged for reason of Convenience of the Government in connection with a reduction in force.
  - b. I am separated or retired by reason of physical disability, illness, injury, or other impairment incurred in the line of duty and not due to misconduct.
  - c. I receive a dependency or hardship discharge.
  - d. I am discharged early for the purpose of immediate reenlistment, provided the reenlistment is in the eligible rating identified in this statement of understanding and the term of reenlistment is for a period greater than the obligated service remaining to be served for payment of the Enlistment Bonus.

\_\_\_\_\_

Signature of Enlisting Officer

Signature of Enlistee (full name)

Date: \_\_\_\_\_

Copy: Parents or Guardian  
Enlistee

DEPT. OF TRASP., USCG, CG-3301V (6-97)

Figure 7-26

Enclosure to COMDTINST 7220.40

## STATEMENT OF DESCRIPTION

G-WPM's Form/Report Information and Authorization Record, CG3342 for revision/establishment of CG-3301V, ANNEX T to COMDTINST 1100.2C, Recruiting Manual.

The CG-3301V is a new Statement of Understanding between applicants for enlistment and the Coast Guard, and will be contained as ANNEX T to the Recruiting manual, COMDTINST M1100.2C. The form will be used as an annex to the standard enlistment contract and sets the eligibility criteria and conditions under which a monetary Enlistment Bonus will be paid to members attending certain guaranteed A schools. The form allows the recruiter to identify the rating for which a bonus will be paid and what level the bonus will be paid. Further, the form describes the conditions under which the Coast Guard may cancel or recoup the bonus.

The CG-3301V will be completed by the recruiter and signed by both the recruiter and the applicant to which an enlistment bonus is paid. The form will be the basis for initiating payment of enlistment bonus and will be attached to the member's Enlistment Contract, Form DD-4, by which it will become a permanent part of the member's military record (Personnel data Record). The form is necessary to implement the new Enlistment Bonus recruiting initiative in support of the Coast Guard's recruiting mission.

DEPT. OF TRANSP., USCG, CG-3301V (6-97)

Figure 7-26

7-100