



2013 CCGNRC Report  
*COAST GUARD NATIONAL RETIREE COUNCIL*

*"Coast Guard For'er"*

Co-chairs  
RADM Ronald F. Silva, USCG Retired  
MCPOCG Vincent W. Patton, USCG, Retired

31 August 2013

To: Commandant (CG-00)

Via: Director, Reserve and Military Personnel (CG-13)

Subj: 2013 NATIONAL RETIREE COUNCIL MEETING REPORT

1. The Commandant of the Coast Guard National Retiree Council (CCGNRC) held its twelfth annual meeting in accordance with COMDTINST 1800.5G from 27-29 August 2013 at Coast Guard Headquarters (Transpoint Building). Attendees are listed in the agenda, enclosure (1).
2. To accomplish its main purposes: (1) to represent and advocate for the Coast Guard Retiree and Annuitant Community, (2) support/assist communications to and from the CG Retirement Community with the Coast Guard, and (3) support/assist the enabling of CG Retiree volunteerism, the Council had an ambitious four part agenda:
  - **Project to Plan for and Implement the CG Retiree Services Program briefings** – The Council was briefed on the new COMDTINST 1800.5G dated 7 March 2013 and the CG Retiree Services Program Implementation planning by the CG Retiree Services Manager, CDR Jim Garzon. The Council was also briefed on the Army Retirement Services Program by COL (ret) John Radke, Chief, Army Retirement Services Program, who provided insights on success factors for a military retiree services program. COL (ret) Radke has been extraordinarily helpful and supportive of the Coast Guard efforts to establish a CG Retiree Services Program.
  - **Retiree Representation and Advocacy work** – Work in this area is accomplished by the CCGNRC Standing Committees:
    - **Benefits and Entitlements Committee**
    - **Outreach and Volunteer Services Committee**
    - **USCG Unique Retiree Services and Program Committee**The Council deviated from its normal standing committee work of identifying the highest priority CG Retiree issues and recommendations to supporting the new Coast Guard Retiree Services Program implementation planning. The Council's three standing committees met in workshops to develop CG Retiree Community advice to eight questions (2-3 per committee) provided by the CG Retiree Services Manager (CG-13). The answers to these eight questions were presented to the CCGNRC members in plenary session for discussion and concurrence and are provided in enclosure (2).
  - **Retiree Council informational briefings** – The Council was briefed by staffs and organizations within and external to the Coast Guard. The briefings from Coast Guard organizations generally related to their roles in the new CG Retiree Services Program, while Military Service Organizations (MOAA, FRA, and

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NAUS) provided briefings on their efforts to support the military active and retiree communities. The agenda, enclosure (1), lists the briefings.

- **Coast Guard Senior Leadership meetings/ceremony/reception** – The Council was extremely appreciative of the level and breadth of participation and support by CG Senior Leadership during the 2013 CCGNRC meeting. The Council met with the Commandant, ADM Papp, who provided an overview of current CG issues and held a Q & A session. ADM Papp presided over an awards ceremony where outgoing CCGNRC Co-Chairs MCPOCG (ret) Vince Patton and RADM (ret) Ron Silva were recognized with Meritorious Public Service Awards for their achievements as Co-Chairs for 11 years and 3 years, respectively. This was followed by a CCGNRC Co-Chair Change of Watch Ceremony where MCPOCG (ret) Skip Bowen and RADM (ret) John Acton were announced as the CCGNRC Co-Chair reliefs for MCPOCG Patton and RADM Silva. Additionally, ADM and Mrs. Papp hosted a reception for the Council on Tuesday evening, 27 August 2013, which was greatly enjoyed and appreciated by the members of the Council. Over the course of the three day meeting, the Council appreciated meeting with the following CG Senior Leaders and notes their support of CG Retiree affairs:
    - Commandant – ADM Bob Papp
    - Vice Commandant – VADM John Currier
    - DCMS – VADM Manson Brown
    - CG-1- RADM Dan Neptun
    - CG-13 – RADM Steve Day
    - MCPO - CGRF Mark Allen
3. There was a “significantly insightful and impactful moment” that occurred during our meeting that we will attempt to capture, but probably won’t do it justice. During a discussion about “what are the retiree services needs of the CG Retiree Community,” our CCGNRC Annuitant-at-Large member, Ms. Lula Carpenter, told us of her personal experience. She noted that when her husband, a retired USCG Captain, had passed away, she notified the Coast Guard and the response was “thanks for letting us know.” She received no support or assistance from the Coast Guard. She said that *“she felt that the CG had let her down ... and did not care.”* Fortunately, she had friends from other military services that got her the services she needed from the other military services. As a result of her experience, Lula has been very active as a member of the CCGNRC since 2010, representing CG Annuitants, and as Secretary of the Capital Area CG Retiree Council since 2008 ... doing all that she could to make things better for others in need!

**The Council feels very strongly that no surviving family member should ever feel this way about the Coast Guard. It is highly recommended that the Coast Guard identify what responsibilities the Coast Guard, as a military service, has to surviving family members (see recommendation in the eighth and ninth bullets of paragraph 4) by benchmarking with the other military services and ensuring that the new CG RSP addresses all those responsibilities, as well as other gaps in CG retiree services. As the Coast Guard National Retiree Council, we feel that supporting our Coast Guard Annuitants is definitely more than simply fielding a phone call to make sure that the retiree's family is not overpaid! The story of her experience put an exclamation point to all present at our 2013 CCGNRC meeting that there are true needs in our CG Retiree Community and gaps in CG retiree services that need to be addressed with the new CG Retiree Services Program!**

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4. The following are items/issues that the Council discussed with our recommendations:
- As the representatives and advocates of the CG Retiree Community and experienced and knowledgeable on many Retiree Affairs matters, CCGNRC Co-Chairs should be engaged and participate with CG-13 staff personnel for COMDTINST 1800.5G implementation for relevancy, needs of retirees, effectiveness and efficiency. Recommend CG-13 ensure proactive and effective communications between the CG-13 staff and the CCGNRC Co-Chairs on a regular basis for the partnership needed for planning and implementing an effective CG Retiree Services Program. Additionally, recommend RADM Day's relief meet with the CCGNRC Co-Chairs as part of the in-brief process to get up to speed on CG Retiree Affairs issues and the CG RSP. Also recommend that CG-13, as the CG Retiree Services Program Director/Manage, review all new Coast Guard policies for their effects on the CG RSP and the CG Retiree Community and communicate to appropriate CG RSP players, including the CCGNRC Co-Chairs, when impactful policies and actions are anticipated.
  - The critical importance of *effective two-way communications (methods, techniques, tools and content) between the Retiree Community and the CG Retiree service providers* was discussed by all three Standing Committees and was highlighted as an imperative by COL Radke during his Army Retiree Services brief. Recommend that a CG Retiree Communications Workgroup of key players, including advice and input from the CCGNRC, be chartered to ensure appropriate and effective communications (methods, techniques, tools, and content) solutions be developed and implemented.
  - There was productive discussion about the need for a clear Vision Statement and Concept of Operations type document to better articulate how the new CG Retiree Services Program is intended to work. The new COMDTINST 1800.5G is a good start for the policy of the new program, but lacks the clarity and detail of a vision of an intended future state and a narrative of how the new program is intended to work. For example, there seems to still be a lack of understanding as to how the CG Retirees Services Desks (staffed primarily with volunteers, but led by CG active personnel,) are to work in relationship to the role of the CG Retiree Councils. Recommend that a Vision Statement and Concept of Operations (with appropriate organization chart) be prepared to clarify the roles and responsibilities implementation and launching of the new CG Retiree Services Program.
  - The discussion of the Concept of the "Life Cycle of the CG Retiree (including Annuitant)" was powerful and should be developed further, particularly for the Vision Statement and Concept of Operations development. By understanding the Life Cycle of CG Retirees and how the needs change over time, the new CG Retiree Services Program can be more targeted and effective, especially to those with the greatest needs. Recommend that the "Life Cycle of the CG Retiree" be developed by consultation with the other military services Retiree Services Programs, especially the Army, and input and advice from the CCGNRC. There is a draft of a thought piece to this idea in the Answer to Question #5 in Enclosure (2).
  - There was much discussion on the importance of an effective "launch of the new CG Retiree Services Program" both internal to the Coast Guard and to the CG Retiree Community. Recommend that as part of the new CG RSP launch, that Retiree Appreciation Days be held in conjunction with CG Day Picnics where Retiree Services functions are located (generally CG Bases). It is also

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recommended that the Commandant (ADM Papp and his relief) and other Senior CG Leaders be visible and supportive of the launch of the new CG RSP.

- The value of the CCGNRC developed CG Caregivers Guide to the CG Retiree Community was confirmed by numerous positive comments on the draft that has been posted on several CG Retiree Council websites. Recommend CG-13 expedite implementing/publishing this Guide, with the means to update and maintain an up-to-date document in the future, with CCGNRC support and consultation. It is also recommended that a checklist be added to the next update of the CG Survivors Guide.
- Currently there is no standard, if any, information regarding CG Retiree Services (other than retired pay) or the CG Retiree Council (National or Regional) presented at CG TAPS classes. Recommend that as part of the launching of the new CG Retiree Services Program, that a required, standard briefing & fact sheet be presented to effectively connect the soon to be new retiree with CG RSP info, services, POCs, etc. with the explanation as to why it is important.
- Currently there is no list of CG Retiree benefits, entitlements, privileges, rights, and responsibilities. This info would be beneficial for all those involved with the new CG RSP, especially at the CG RSD. Recommend that CG-13 develop a list of CG Retiree benefits, entitlements, privileges, rights, and responsibilities.
- There was considerable discussion about a big gap in CG Decedent Affairs. A Retiree/Annuitant Decedent Affairs program should be developed by CG-13 and promulgated to CG Base RSDs and should be integrated with existing Decedent Affairs programs. It should include retirees, annuitants, and reservists.
- Ms. Deb Farley noted that PPC will soon be performing the retired pay function for retired Public Health Officers. Many of them served with the Coast Guard as Doctors, Dentists, Pharmacists, Industrial Hygienists, etc. Recommend that future consideration should be given to more formally include them in the CG Retiree Services Program, perhaps as affiliated members and potential retiree volunteers.
- A couple of recommendations for improved clarity were identified for a future update of the COMDTINST 1800.5G and captured by the meeting note taker. Recommend changes be made at the next update of the COMDTINST.

### 5. Summary.

- The Council wants to thank RADM Steve Day, CAPT Steve Nye, and CDR Jim Garzon for their dedicated efforts over the past year. RADM Day took on the responsibility for the CG Retiree Services Program (when it was an orphan) in May 2012 and led the efforts of CAPT Nye and CDR Garzon to get the new COMDTINST written, reviewed and signed. Work is now in progress for planning and implementation of this new program. The Council appreciates very much the opportunity to provide input and advice for this new program.
- The Council acknowledges the current resource constraints that the Coast Guard is experiencing. However, the Council strongly advocates for an improved CG Retiree Services Program, as is defined in the COMDTINST 1800.5G, with defined roles and responsibilities, better organization, coordinated pre-retirement, transition and post-retirement services, better/more use of Retiree services at DoD Bases, coverage for support of all CG Retirees defined by CG Base AORs, expanding and enabling CG Regional Retiree Councils for more retiree volunteerism. This can be achieved with minimal investment and will pay big dividends for the Coast Guard and its Retirees, be a force multiplier, serve as a

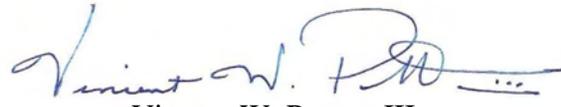
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positive example to the active duty that their connection to the CG does not end at retirement, and strengthen “the long blue line” CG culture.

- The Council is very excited about this opportunity to improve the Coast Guard Retiree Services Program and stands ready to assist in making it a reality.
6. The Council would like to thank CAPT Steve Nye, CDR Jim Garzon and the other CG-13 support staff for their diligent work in preparations and support for the CCGNRC 2013 meeting. BZ!



Ronald F. Silva



Vincent W. Patton, III

Enclosures:

- (1) 2013 CCGNRC Meeting “As Met” Agenda
- (2) 2013 CCGNRC Standing Committees’ Input to the CG Retiree Services Program Implementation



***2013 Commandant of the Coast Guard  
National Retiree Council Meeting  
Transpoint Building, 5<sup>th</sup> Floor, Room 5-1224***

Monday, 26 August: Travel Day – Arrive at the Bolling Inn, 3621 Luke Ave S.W. Washington, DC 20032 From: DCA (Reagan National Airport) take 395 North to 295 South exit 2 (South Capital St, Malcolm X Ave, Bolling AFB) after passing security gate, make 1<sup>st</sup> left onto Brookley Avenue, at 2<sup>nd</sup> Stop sign make right onto Angell St, next make 2<sup>nd</sup> entrance on right (Bolling Inn) (202) 404-7050 / (202) 610-8000 CDR Garzon (954)-650-5052

ATTENDEES

RADM Ron Silva	CCGNRC Co-Chair (recall orders)
MCPOCG Vince Patton	CCGNRC Co-Chair (recall orders)
RADM John Acton	Prospective CCGNRC Co-Chair
MCPOCG Charles ‘Skip’ Bowen	Prospective CCGNRC Co-Chair (recall orders)
CAPT David Bernstein	Capital Area
MCPO Larry Conley	Yorktown
MCPO Bobby Wester	First Coast (Jacksonville, FL)
MCPO Marc Fagenbaum	Greater Miami
CDR Don Goldstein	Tampa/St. Petersburg
SCPO Jack Crowley	Central Gulf Coast/Mobile
MCPO Keith Livingstone	St Louis (forming)
MCPO Regis Cooney	North Coast
CDR Sal Romo	Northern California
LCDR Phil Johnson	Pacific Northwest
CPO Anthony Lim	Hawaii
Ms. Lula Carpenter	Annuitant at Large
CPO Penny Collins	Military Service Organization/FRA
CAPT Bob Warakomsky	National CG Retiree Help Desk Representative
Ms. Susan Baicar	Civilian Retiree Council Liaison
RADM Steve Day	CG-13
CAPT Steve Nye	CG-13d
CDR Jim Garzon	CG-13(CG Retiree Services Manager)
CG-13 Staff members	CCGNRC meeting support

Note: New England, Cape May, Tidewater, East Central Florida, & Kodiak RCs not represented

Enclosure (1)



***2013 Commandant of the Coast Guard  
National Retiree Council Meeting  
Transpoint Building, 5<sup>th</sup> Floor, Room 5-1224***

Tuesday, 27 August: Uniform of the Day: ***Business Casual ~ Slacks and Open Collared Shirt / Trops (Coat and Tie for Change of Watch Ceremony Participants)***

- 0645 – Depart Bolling Inn (GV's) Early Breakfast Departure to Transpoint
- 0715 – Depart Bolling Inn (GV's)
- 0800 – Welcome Aboard  
→ *RADM Day*
- 0830 – Administration & Logistics  
→ *CDR Garzon*
- 0845 – Introductions & Review Agenda  
→ *RADM Silva / MCPO Patton*
- 0915 – Review of the 2012 Report and COMDT Response  
→ *CDR Garzon*
- 0930 – *Break*
- 0945 – Army Retirement Services Program  
→ *Mr. John Radke*
- 1030 – Continue Review of the 2012 Report and COMDT Response  
→ *CDR Garzon*
- 1130 – Legislative / Veterans Affairs  
→ *Mr. Michael Plumer (NAUS)*
- 1200 – *Lunch – hosted by National Association for Uniformed Services (NAUS)*
- 1300 – Report on the new COMDTINST 1800.5G  
→ *CDR Garzon*
- 1415 – CCG meeting, Change of Watch ceremony – (Rm 2610)
- 1515 – *Break*
- 1530 – Continue Report on the new COMDTINST 1800.5G  
→ *CDR Garzon*
- 1630 – Adjourn
  
- 1645 – Depart Transpoint (GV's) to Bolling Inn
- 1745 – Depart Bolling Inn (GV's) to Commandant's Quarters
- 1800 – Commandant's Quarters Reception (Dress: Business Casual)
- 2000 – Depart Commandant's Quarters (GV's) to Bolling Inn



***2013 Commandant of the Coast Guard  
National Retiree Council Meeting  
Transpoint Building, 5<sup>th</sup> Floor, Room 5-1224***

Wednesday, 28 August: Uniform of the Day: ***Business Casual ~ Slacks & Open Collared Shirt / Trops***

- 0645 – Depart Bolling Inn (GV's) to Transpoint
- 0800 – Review / Preps for Day  
→ *RADM Silva / MCPOCG Patton*
- 0815 – PPC – Retiree and Annuitant Service  
→ Presented by: *Ms. Debbie Farley*
- 0915 – Retiree Help Desk  
→ *CAPT Bob Warakomsky*
- 0945 – Health Safety & Work Life (HSWL) Mobile App  
→ *Mr. Bob Skewes*
- 1000 – *Break*
- 1015 – Director of Operational Logistics (DOL)  
→ *Mr. Steve Sabellico / CDR Dirk Stringer*
- 1100 – Military Coalition – MOAA / FRA Legislative Brief  
→ *Mr. Phil Odom (MOAA) & Mr. John Davis (FRA)*
- 1145 – Depart for Flag Mess
- 1200 – *MOAA Reception in Flag Mess*
- 1300 – Report on the new CG RSP Implementation Plan  
→ *CDR Garzon*
- 1400 – St. E's tour
- 1600 – St. E's tour complete
  
- 1615 – Depart to FRA Reception (GV's)
- 1715 – CCGNRC Reception Sponsored by the Fleet Reserve Reserve Association (FRA) at FRA Headquarters in Old Town Alexandria  
Uniform of the Day: ***Business Casual ~ Slacks & Open Collared Shirt / Trops***
- 1915 – Depart FRA Reception (GV's) to Bolling Inn



***2013 Commandant of the Coast Guard  
National Retiree Council Meeting  
Transpoint Building, 5<sup>th</sup> Floor, Room 5-1224***

Thursday, 29 August: Uniform of the Day: ***Business Casual ~ Slacks & Open Collared Shirt / Trops***

- 0645 – Depart Bolling Inn (GV's) to Transpoint
- 0800 – Review / Preps for Day  
→ *RADM Silva / MCPOCG Patton*
- 0815 – CCGNRC Standing Committees Introduction  
→ *RADM Silva / MCPOCG Patton*
- 0830 – CCGNRC Standing Committee Workshops (3)\*\*  
Develop Answers to Questions/Recommendations  
→ *Committee Co-Chairs*
- 1130 – CCGNRC Standing Committee Workshops (3) Brief  
Out to full CCGNRC  
→ *Committee Co-Chairs*
- 1200 – *Lunch at Transpoint*
- 1300 – Continue CCGNRC Standing Committee Workshops (3) Brief  
Out to full CCGNRC  
→ *Committee Co-Chairs*
- 1400 – Develop topic list for 2013 CCGNRC Report  
→ *RADM Silva / MCPOCG Patton*
- 1500 – *Break*
- 1515 – Travel Claims /Admin / Surveys  
→ *CDR Garzon / LTJG Thornell*
- 1545 – Closing Remarks  
→ *RADM Silva / MCPOCG Patton*
- 1600 – Closing Remarks  
→ *RADM Day / New Co-chairs*
- 1645 – Depart Transpoint (GV's) to Bolling Inn

\*\*Break out rooms: 5-1224, 5-0622, and 5-0624

Friday, 30 August: Travel Day; Have a Safe Trip Home

Enclosure (1)

## **2013 CCGNRC Standing Committees' Input to the CG Retiree Services Program Implementation**

### **Benefits and Entitlements Committee:**

**Question #1:** The CG Bases/selected TRACENs Retiree Services Desks (RSDs) are key components of the new CG Retiree Services Program (RSP). What types of services / information are most needed by our retiree community? Break the needs down to general military benefits and entitlements and CG specific benefits and entitlements (using the model where we steer CG Retirees to other military bases Retiree Services Office (RSOs)) for general military services and info and our CG RSDs can provide CG specific info and services.

**Answer #1:** Based on the data collected from CCGNRC National Retiree Help Desk over the last several years, as well as anecdotal data from other CG Regional Councils, the following represents our estimate of the types of services / information that are most needed. Next to each item is the most probable source of the information. This will vary by geographic location and proximity to major DoD bases.

- Pay – CG Pay & Personnel Center (PPC)
- Request for verification letters of service and retirement – PPC
- Access to Caregiver Guide (draft) and Survivor Benefit Guide - PPC
- Defense of Marriage Act (DOMA) Repeal effects and new benefits– PPC
- Grey area Reservists - PPC
- Medals and Awards – CG Personnel Services Command (PSC)
- Burial Benefits/Burial at Sea – Decedent Affairs Officer
- Veterans Administration (VA) Claims – PPC, VA, Military Services Organizations (MSOs), and State, County, and local Veterans Service Organizations (VSOs)
- ID card issuance/locations (inquiries about required documents) – Website
- DD214 questions and copies - Website
- Mutual Assistance – Website
- Coast Guard Foundation – Website
- MWR services and facilities – Local Coast Guard and DoD bases
- Legal services/assistance - Local Coast Guard and DoD legal offices
- TRICARE Prime and TFL/Health Care Benefits – Local/DoD TRICARE Desk
- Medicare (Parts A&B) – Medicare, TRICARE, PPC
- Social Security – Local Social Security Administration, Website
- DoD services (i.e. Medical, Commissary, Exchange, etc.) – Local DoD bases, Website
- DoD Retiree Appreciation Days (required annually) – Local DoD bases
- Educational/training courses - DoD bases
- Employment opportunity services/info - DoD bases

**\*\*[Also, recommend that PPC include a checklist in the next edition of the Survivor's Benefit Guide to facilitate surviving spouses or other caregivers in handling the deceased's affairs.]\*\***

**Benefits and Entitlements Committee:**

**Question #2:** A key strategy to the new CG RSP is to get our CG Retiree Community to take better advantage of all the retiree services and info available at other DoD military services bases, the VA, military service organizations, etc. What are some concrete recommendations for improvements in informing our CG Retirees and getting them to take advantage of these services, info, etc.?

**Answer #2:** The following is a list of sources for publication of the Commandant's Retiree Services Program. Every opportunity should be made to notify our CG Retiree and Annuitant Community of the newly available services.

- Letter signed by the Commandant (CCG) to all Retirees and annuitants announcing stand up of Retiree Services Program
- Include in all Retiree's LES and 1099-R
- ALCOAST announcing standup of the CG RSP
- Retiree Newsletters (PPC, Regional & local)
  - CPOA Newsletter/Magazine/Website
  - CWOA Newsletter/Magazine/Website
  - CG Academy Alumni Association Newsletter/Bulletin/Website
  - Pterodactyl (CG Aviators) Newsletter/Magazine/Website
  - Coast Guard Enlisted Association
  - Coast Guard Retiree Website
- Include in CG Mutual Assistance Letter
- Announce in CG Reservist Magazine, include copies to grey area reservist
- Coast Guard All Hands Blog
- Coast Guard Compass
- New CG RSP communications tools and methods when developed

Enclosure (2)

**Outreach and Volunteer Services Committee:**

**Question #3:** If success of the CG Retiree Services Program (RSP) depends on: 1) Retiree awareness of the CG RSP 2) Key role player support 3) Sustainable volunteer cadre, then, what has to be in place to develop and maintain support in these key areas?

**Answer #3:** Retiree Awareness of the CG RSP

- Should also apply to Reservist “gray area” Retirees
- There should be a seamless transition, a “handoff” between active status to retirement, linking all elements involved in moving member from active to Retiree status. That includes all responsible parties involved with the transition (i.e. PSC, PPC, TAPS Classes, CG Bases, etc.). Discussions among all these elements must take place to accomplish this goal, resulting in a specifically designed process. Upon retirement, member should be given a “Welcome to your Retiree Support” package which provides information on where their servicing CG RSD is (phone number & location) and how to get in touch with the CG RSD and the appropriate Regional Council.
  - Recommend a standardized 15-30 minute presentation on the CG RSP added to TAPS classes
- The CG RSP Website
  - should contain similar information as newsletter
  - One up-to-date Website containing current information important to Retiree
  - Should link easily to local Websites containing information of local interest – DOD & Coast Guard
    - Retiree-focused classes (how to write resume, interview, etc.)
    - Employment opportunities
    - Recreational opportunities
    - Location of medical facilities, commissaries, exchanges, etc.
- Easy availability of two-way communications between Retiree and Retiree Services Desk
  - Easily available phone number
    - Central number with voice notice to dial “extension” for connection to each local RSD
  - Use of US Post Office mail is problematic for ongoing communication. “Incentivize” obtaining email addresses from all retiring member ... make it worth their while!
  - Establish project to “find” Retirees, providing CG RSP information & acquiring email addresses from those already retired. Assume “worst-case” scenario. Retiree moves often, no Web access, etc. How would CG reach retiree?
    - Fill-in on Website for email address

Enclosure (2)

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- Tear out in newsletter for mail-in
- Any mail sent by RSDs & PPC to Retirees has notice, instructions, & why important to CG and them to provide email addresses
- RSDs should immediately upon notification of approaching retirement, contact the prospective Retiree, indicate desire & ability to ease Retiree into retirement and schedule face-to-face discussion (providing distance is not prohibitive).
- Information available to/passed to Retiree must be current, accurate, valuable and useful.
- The information provided to the retiree must be “actionable.” That is, of sufficient detail and sufficiently accurate that the retiree can use it to take action.
- Communication to Retirees in AOR should be relatively frequent (i.e. monthly, quarterly), frequency to be determined through a policy decision so Retiree expects to receive it & relies on it
- Information on CG RSP should be provided frequently in CG/NOAA Retiree Newsletter including listings of and location of CG Bases with RSDs and their AORs
  - Critical to ensure that Retirees are receiving the newsletter. Experience of National Retiree Council membership is that many are not receiving the newsletter.

### Key Role Player Support/Sustainable Volunteer Cadre

- As previously stated above, to establish & maintain key role player support, “Communications is the most significant issue. Continued role player interest and support requires that the Retiree sees benefit in maintaining contact with the CG RSP responsible parties ...” That the key role players are able to interact with Retiree directly, producing an information stream that provides Retirees with information that is of value, timely and useful. The Retiree must be “attracted” by the value provided through the RSP & use the program. Key role players must see that they provide a useful service. Otherwise interest will wane.
- Evident, public Commandant support for the CG RSP such as through ALCOASTs, “State of the Coast Guard” address, visiting with CG Retiree Councils in the field, etc. Articulating and embedding “The Long Blue Line” concept into the CG culture and mentioning the value of the CG RSP to Retirees and active duty members.
- Strong active Command support for the CG RSP
  - Base Command actively leads their RSD and its delivery of Retiree Services while engaging and enabling its volunteer “partners” for an effective operation of the RSD. Create and maintain “A team activity”
  - The RSD is considered an integral part of Base operations (not peripheral)
  - Base Command structure take seriously the responsibility to engage with other DoD bases, RSO’s in their AOR, especially where there are significant CG Retiree populations (obtained through zip codes).
  - Evident support through the TAP program by providing the RSP

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information to prospective Retirees and providing contact information to appropriate local CG RSD and CG Regional Retiree Council.

**\*\*[ CG Retirees must be part and parcel with the active side – not like the way reserves were treated many years ago - now the reserves are welcomed with open arms. ]\*\***

- The CG RSP is considered a national, service-wide program, a CG strategic imperative (CG Families Program) and is treated as a high priority (like the other military services)
  - Ongoing communications/sharing among CG and other military Bases/RSOs/RSDs on lessons learned
  - National standardization – no difference in quality of service from region to region
  - National programmatic oversight & management
- Official inclusion of CG Auxiliary in the CG RSP as volunteer supporters

To fully understand how the CG RSP should function, a “VISION” of a successful RSP should be created. Such a vision exists in earlier documents presented to CG-13 by the National Retiree Council. To define how that “vision” actually operates, and all the component parts, information & interdepartmental interaction that needs to happen for a successful program, a “Concept of Operations” is necessary. The Concept of Operations provides in detail a narrative and graphic depiction of how the process is carried out from its inception to completion with all participants & information defined/described. **\*\*[ In our opinion this issue MUST be in place before the program makes any more progress. This is a critical point!]\*\***

### **Outreach and Volunteer Services Committee:**

**Question #4:** How do we attract and keep an active cadre of retiree volunteers to support the CG Retiree Services Program? What are the challenges with attracting and keeping cadre of retiree volunteers and what opportunities/value do they provide?

**Answer #4:** How do we attract the volunteers?

- Must make it easy for CG Retirees & CG Auxiliarists to volunteer
- For the portion of the CG RSD mission that deals with answering phone call or e-mail inquiries from Retirees, it may make sense, under certain circumstances, to allow for operating a “virtual” help desk. While a “physical” RSD is still needed for other Retiree Services functions, attracting Retiree volunteers requires flexibility and understanding that volunteers staffing a physical desk may limit the pool of potential volunteers and a combination of virtual and physical operations may be beneficial under certain circumstances. Particularly in a large geographic region, potential volunteers may reside far from the Base which houses the RSD. Even where volunteers are willing to travel long distances to the base, the travel involves expenses, possibly driving to and from during heavy traffic periods and potential hazards during inclement weather. An

Enclosure (2)

alternative is to have a volunteer remain at the Base for the assignment period, possibly several days. Also, our experience indicates that service to Retirees is a 24/7 job (or more frequently a 14/7 job), especially if the National Retiree Help Desk is to be retired at some point. Although arrangements can be made to “follow the sun,” if the retiree has a situation requiring contact with the RSD and assigned RSD has knowledge of that Retiree, that can be more easily managed by a virtual RSD.

- In summary, a requirement that a volunteer staff a physical desk on a CG Base is restrictive, inflexible and will reduce the number of available volunteers

**\*\* [ The CG RSD needs to have, at minimum, one day a month looking into the PPC address list (RAF) for “new” retirees. ]\*\***

How do we properly care for the volunteer?

- Retiree volunteers must know (as previously stated) that they are providing useful, valuable, needed information and services that benefit the Retiree and that they are an integral part of the overall CG Retiree Support Program
- Retiree volunteers must be “enabled” ... provide the tools and make it as easy, rewarding and fun as possible to “give back” to the CG that they love ... eliminate as many of the dis-satisfiers (to volunteers) as possible!
- Volunteer must have ability to engage in rapid 2-way communications with Retiree. Attempting to conduct business via postal mail is problematic today and will become even more problematic in the future. The Retiree volunteer must have all the tools and information necessary to be fully productive
- Volunteer must be made to feel like a member of the CG Base staff and be considered an integral part of the Base operations (not a peripheral appendage) and they must feel appreciated by the Base Command structure. The entire CG active duty community must display an “enabling attitude.”
- Proper training of the volunteer staffing the CG RSD will be a key to success.
  - A comprehensive and thorough training syllabus and program must be developed and administered. An important aspect of this is to identify all of what the volunteer should be doing to carry out the CG Retiree Services mission, such as two-way communications between the CG and retirees, forging relationships with different organizations, networking with the other service’s RSOs, researching and identifying new benefits, activities, etc.
  - In addition, a standard, specific, detailed instruction on how to carry out all aspects of the CG RSD functions must be developed
  - What the Retiree volunteer can say to the caller/visitor and what they cannot. Example stated at the National meeting, do not respond to a question on whether the CGC Bibb had asbestos in the engine room. Refer the question to CG Legal. Do not attempt to answer questions where an expert in that topic exists in the CG and can respond in greater detail and look for additional ramifications. Be aware of the potential for significant legal liability issues.
  - Provide a “template” or checklist on functions. Work-life reportedly had something similar in the 1990’s

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## 2013 CCGNRC Report

What are the challenges with relying on a volunteer staff?

- Again, assuring that the Retiree volunteer feels he/she is serving a useful, important & highly valued function
  - Potential Retiree volunteer thinking that the process will not work
    - Successes need to be made public within the CG Retiree Services Program (i.e. other military services RSPs have Volunteers of the Year Programs)
  - Not enabling Retiree volunteers by not providing them the tools, training, an appropriate work environment and eliminating dis-satisfiers
    - Consider the best mix of physical and virtual help desk (but ensure all RSD functions are accomplished!)
  - Not building and maintaining a pool of volunteers large enough to staff the RSD function, including normal turnover and reasons that Retiree volunteers cannot serve on any particular day, requiring substitutes
  - “Been there, done that” (i.e. Retiree National Help Desk) ... not understanding that the new RSP is meant to improve the level and breadth of CG Retiree Services (fill identified service gaps compared to the other military services)
  - Need for visible, ongoing support at all levels
    - Integrating RSD volunteers into Base activities.
    - Base Command counts on RSD Retiree volunteers to help meet Base CG RSP performance goals
  - Need for accountability
    - Responsible parties as delineated in COMDTINST 1800.5G must be held accountable for performance within the CG RSP
      - Measurable success criteria
      - Develop Critical Success Factors. – What does success look like?
      - The active duty RSD Coordinator as a collateral duty. Crisis of the day & short-staffing puts off what seems like a lower priority
      - Need for agreement/”contract” between Retiree volunteer and CG Base CO indicating Retiree volunteer’s commitment
        - How long (not less than 6 months??)?
        - Number of hours/days available
      - Survey Retiree’s needs

What opportunities/value do volunteers provide?

- Retirees as a local resource with local knowledge
  - Housing, neighborhoods, mass transit, medical facilities, dependent’s facilities (schools), advanced education, etc.
  - Retirees supporting active service in local knowledge as well as Retirees

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**Outreach and Volunteer Services Committee:**

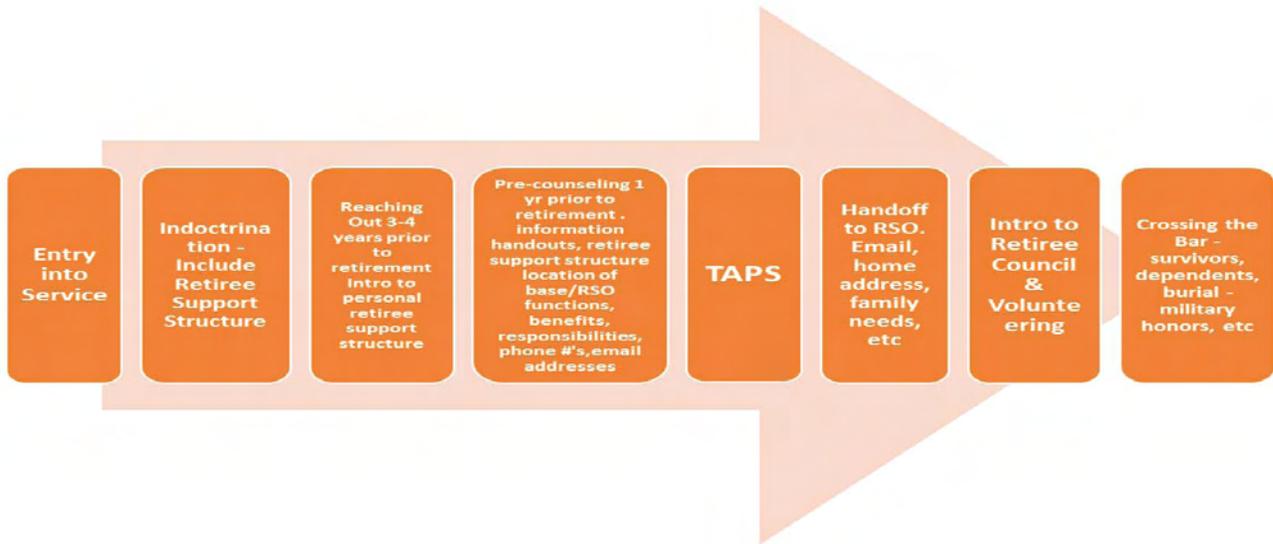
**Question #5:** What local representatives, organizations and services may the retiree services desk want to develop a partnership with in support of the local retiree community? This may include: training, education, skill-sets and MWR, etc.?

**Answer #5:** The CG RSP needs to consider the CG Retiree as a “Whole Person.” Useful partnerships depend on that concept

- Other Military Bases/RSO’s proximal to Retiree’s location
- VA facilities and services
- Local clinics & hospitals
- MWR facilities
- Health, Education, Dependents,
  - USO’s
  - Colleges, Universities, other Educational Institutions
  - Ombudsman
  - Local Housing Resources
  - Neighborhoods
  - Mass transit
- Other potential members of the CG Retiree Volunteer pool
  - Retired members of the other military services (Army, Navy, Air Force, Marines)
  - CG Auxiliary members
  - Retired CG civilian members
  - Retired USPHS officers (particularly those that served with the CG)
  - Retired NOAA officers
  - Spouses of Retirees
  - Annuitants
- An important strategy in the new CG RSP is to “take advantage of all the Retiree services and info available at other DoD military Base.” The CG Base RSD shall make every effort to partner with other military Bases in their AOR, particularly where significant CG Retirees reside, so that they can inform CG Retirees of all the information needed on “General Military Benefits” as well as CG specific info & services. Objective for all CG Retirees is to be provided with all the available information and services that they are entitled to. Of course, the CG Retiree will visit DoD facilities to avail him/herself of the DoD benefits such as Retiree Appreciation Days, MWR benefits, clinic & hospitals, etc.

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# THE LONG BLUE LINE



## *The Retiree Life-Cycle*

The Coast Guard Retiree Services Program needs to be integrated into the fabric of the service. It does not merely take effect when the member is ready to retire. The member needs to be introduced to the CG RSP during the indoctrination upon entry to the service. He/she may not remember it, but it will be part of the benefits provided to the member, if they make a career in the Coast Guard. The CG RSP needs to be reinforced and evident to member at every unit to which the member is attached. Three to four years prior to retirement eligibility, member is provided with information on structure and how it works, personal to the member. One year prior to actual retirement, member receives pre-counseling. This includes handouts providing information such as the “handoff” process, location of CG Base RSD, RSD functions, benefits, Regional Retiree Councils, responsibilities, phone numbers & email address of CG Base RSD. At the mandatory TAP class, the CG member (and hopefully spouse) is given a video presentation and advised specifically the location and information on functions & value of the CG Base RSD. Information on Retiree, email address, prospective phone number, likely physical address, etc. is forwarded to the appropriate servicing CG Base RSD. On retirement, the CG Base RSD contacts the Retiree, introduces the purpose & functions of the CG Base RSD and offers support & makes appointment for face-to-face meeting. At the meeting, the CG Base RSD discusses Retiree’s specific needs, how those needs can be satisfied & introduces Retiree to the appropriate Regional Retiree Council and provides information on volunteering opportunities. Through ongoing communication with the Retiree, a relationship is established & maintained. As medical needs arise, RSO provides guidance & assistance to family. When changes occur that impact the Retiree’s military benefits, such as marriage, divorce, other dependent changes, turning 65, changes in VA benefits, etc. the CG Base RSD is available to service those needs. At “crossing the bar”, the CG Base RSD engages family, provides guidance on survivor benefits, assists in planning for military burial at family’s option, etc. & otherwise supports the family through this difficult period.

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**USCG Unique Retiree Services and Program Committee:**

**Introduction:**

As you'll see below, we've identified several issues and made recommendations concerning them. However, one stands out. *To our knowledge, there's no single list of retiree benefits, rights, privileges, entitlements and responsibilities which the CG Base RSDs can respond to.*

*To be successful, the CG Base Retiree Services Desk must have some understanding of these benefits, rights, privileges, entitlements and responsibilities for which the retiree or surviving spouse is eligible, depending on status. And we must make an extra effort to help a surviving spouse who may feel abandoned after the sponsor's service.*

*We obviously don't want the CG Base RSD retiree volunteers to say much about asbestos, Agent Orange, or LORAN radiation ... but the RSDs should point Retirees to the appropriate office to get the correct answer. But we do want people to know benefits may be available to qualified veterans with these issues and where to send them for additional information.*

*We recommend that CG-13 compile an inclusive list of benefits, rights, privileges, entitlements and responsibilities for veterans, retirees, medical retirees, those with medical discharges, and surviving spouses, that would help orient the CG Base RSDs and other CG RSP players (PPC, PSC, etc.) to assist retirees (this should be part of the training). It would also be helpful to supply guidance about skills, abilities, personal equipment (if any) and training requirements to the Regional Councils so they can initially screen volunteers.*

**Question #6:** The CG Base/TRACEN Retiree Services Desk and their corresponding Regional Retiree Council(s) are key components of the program; what are the key implementation items to improve CG RSP success?

**Answer #6:** Base COs and Regional Retiree Councils must be informed that under the CG RSP (COMDTINST 1800.5G), the new CG Base RSDs and the CG Regional Retiree Councils now have new roles and responsibilities. This will initially require frequent and close collaboration between the CG Base CO/XO and Regional Retiree Council Co-Chairs ... and between the CG Base CO/XO and the Active Duty Retiree Services Coordinator (RSC) ... and among the RSC, Retiree Volunteer Director, and Volunteer Watch-standers.

*An organization chart showing new chain of command elements should be developed for CG Base CO approval and mutual understanding. Strong collaboration between the RSC and the RVD is a must.*

CG-13, with PPC support, should develop a self-subscribe/unsubscribe broadcast list (List Serve) as a way to communicate with retirees. Active training for all personnel in the new roles, including volunteers, should be provided by CG-13. Frequent feedback from the CG Base RSD to the other key CG RSP players (including Regional Retiree Councils) is essential. Regional Retiree Councils must maintain close liaison and should meet frequently with Base COs.

**USCG Unique Retiree Services and Program Committee:**

**Question #7:** How can CG Retiree Services improve with better integration/coordination/unity of effort of all players providing Pre-retirement, Transition, and Post-retirement services with key role players such as: PSC, PPC, CG-111, DOL, and HSWL? What key discussions should periodically occur between: 1) CG RSP Program Manager & CCGNRC 2) CCGNRC & Regional Retiree Councils 3) CG Base/TRACEN CO & RSD Coordinator and Volunteer Director 4) Retirees Services Manager and all the key role players in the CG RSP, etc.?

**Answer #7:** The handoff from active duty to retired status should be standardized so that all retirees receive the same basic information. CG-13 and HSWL should create a standardized TAPS presentation to be utilized throughout the Coast Guard. Qualified volunteers from Regional Retiree Councils – among others -- can be used to give this presentation. This would be particularly useful at Retiree Appreciation Days (RADs). A tickler file of gray-area reservists approaching 60 should also be forwarded to CG Base RSDs, perhaps from PPC.

A Retiree/Annuitant Decedent Affairs program should be developed by CG-13 and promulgated to CG Base RSDs and should be integrated with existing Decedent Affairs programs. It should include retirees, annuitants, and reservists.

The new CG RSP should be launched with maximum marketing: Articles in all CG magazines and newsletters, plus a USPS mail-out from PPC to all Retirees.

This would include letters from the Commandant, the new CCGNRC Co-Chairs, information on how to affiliate with Regional Retiree Councils, and a questionnaire whose fulfillment could result in capture of regional e-mail addresses and reward respondents with CG Exchange discount coupons. The program should be promoted at least quarterly for the next year.

Briefings from each Regional Retiree Council should be included in all future National Retiree Council Meetings so that all can hear lessons learned and learn about best practices.

Recommend that CG-13, as the CG Retiree Services Program Director/Manage, review all new Coast Guard policies for their effects on the CG RSP and the CG Retiree Community and communicate to appropriate CG RSP players, including the CCGNRC Co-Chairs, when it's anticipated that policies and actions will affect retirees.

**USCG Unique Retiree Services and Program Committee:**

**Question #8:** How do we measure overall retiree services desk success? What statistics, collaborative efforts, partnerships or referral services provided, do we want to capture?

**Answer #8:** We need some help with these metrics. Recommend that CG-13 survey the other military services and determine what measures DoD uses to indicate the relative success of their Retiree services program and specifically their Retiree Services Offices. Not all will be appropriate for us, but some will likely be valuable.

Other measures to consider include:

- Number and quality of external partnerships established and maintained
- Number of referrals to other DoD Base services
- Total number of inquiries (walk-in, phone calls, e-mail, USPS mail)
- Percentage of individual problems solved

There are existing forms, logs, and measures that may be helpful, for example from the CCGNRC National Retiree Help Desk and from the other military services.

We need to build job/task analyses for appropriate players so that everyone knows what the CG RSP players, including volunteers, are supposed to be doing and can verify that they're accomplishing the appropriate tasks. Then we can start building benchmarks for CG RSP performance.

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