

U.S. Department of
Homeland Security

United States
Coast Guard



Commandant
United States Coast Guard

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1800

MEMORANDUM

KB Hinrichs 12/16/15

From: K. B. Hinrichs, RADM
COMDT (CG-13)

Reply to Robert Hinds
Attn of: (202) 475-5451

To: Commanders, CG Bases and Commanding Officer, TRACEN Cape May
Thru: (1) DOL
(2) FORCECOM

Subj: CG RETIREE SERVICES DESKS/REGIONAL RETIREE COUNCILS

Ref: (a) Coast Guard Retiree Services Program, COMDTINST 1800.5G
(b) Retiree Services Program Training Guide & Resource Kit

1. As required by references (a) and (b), please provide your consolidated retiree services desk/regional retiree council feedback and recommendations to CG-13 by January 31, 2016. This information will be considered during the annual meeting of the CG National Retiree Council (CGNRC) in April 2016 and first tri-annual review of the CG Retiree Services Program.
2. As described in enclosure (1), the CGNRC has raised questions regarding the scope and function of the retiree services desks in its annual reports to the Commandant. There are also preliminary indications that the current retiree services desk policy/procedures, modeled after DoD retiree services offices, may be somewhat over-engineered for the needs of the Coast Guard and its military retiree community. Your candid feedback will help us to better define the scope and function of these activities to make best use of our scarce resources and avoid redundancy.
3. Please complete attached worksheets, enclosures (2) and (3), which should take no more than an hour, to help me in collecting needed information. My point of contact is Mr. Robert Hinds, CG Retiree Services Program Manager, at 202-475-5451, robert.c.hinds@uscg.mil.

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Enclosure: (1) CG-13 Response to 2015 Annual Report of CGNRC
(2) CG Retiree Services Desk Worksheet
(3) CG Regional Retiree Council Worksheet

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MEMORANDUM

K. B. Hinrichs 12/1/15
From: K. B. Hinrichs, RADM
COMDT (CG-13)

Reply to Robert Hinds
Attn of: (202) 475-5451

To: CG National Retiree Council Co-Chairs
RADM John Acton, USCGR (ret)
MCPOCG Skip Bowen, USCG (ret)

Subj: 2015 ANNUAL REPORT OF THE CG NATIONAL RETIREE COUNCIL

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

1. As the Commandant's Executive Agent for the Coast Guard National Retiree Council (CGNRC), I want to thank you and all Council members for your annual report and continued service to the CG military retiree community and CG Retiree Services Program, reference (a).
2. As we discussed with the Commandant on 5 Oct 2015, I ask for your continued support in addressing the Council's Top Priorities, listed below and further discussed in enclosure (1).
 - a. Clarify the proper roles and relationship between the CG National Retiree Help Desk (NRHD) and regional CG Retiree Services Desk help lines, reducing redundancy without leaving service gaps.
 - b. Hold Active Duty Commands accountable for integration and ownership of CG Retiree Services Desks, as established and discussed in CI 1800.5G.
 - c. Establish procedural consistency for all CG Retiree Service Desks and an effective network of desk volunteers. Provide strategies and share best practices regarding how to identify and recruit retiree volunteers to staff the desks.
 - d. Retiree information needs to be formally integrated into the separation out-processing for all retiring personnel and annuitants. This includes a CG Retiree presence at all CG TAP Seminars.
 - e. Promulgate and distribute a "Care Givers' Guide" for annuitants.
 - f. Resolve how to most effectively and efficiently contact retirees, including legal and financial considerations (e.g., email vs. mail addresses)
3. Again, please extend my sincere appreciation and BZ to the Council!

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ENCLOSURE(1)

Subj: 2015 ANNUAL REPORT OF THE CG NATIONAL RETIREE COUNCIL

Enclosure: (1) CG Retiree Services Plan of Action and Milestones

Copy: CG-11
CG PSC/PPC
DCMS
DOL

CGNRC PRIORITIES - PLAN OF ACTION & MILESTONES

Rev: 11/20/2015

| # | Source | Issue, Goal, Objective | Discussion | Planned Actions, *Milestones , Efforts, Status | Complete |
|----|-----------------------------------|--|--|---|-----------------------------------|
| 1 | CGNRC Priority #1 CGNRC 2015-1 | CG RSDs/NRHD: Clarify the proper roles and relationship between the CG National Retiree Help Desk and the evolving regional services desk help lines, reducing redundancy without leaving service gaps. | The long-established national 1-800 help line has a proven track record of success. The evolving regional Retiree Service Desks were intended to provide local information to retirees. The National CG Retiree Help Desk (NCRHD) has always functioned in the same way, responding to calls, emails from Retirees requiring support and assistance. The attached instructions define these activities and how they are handled. That is all the NCRHD does and the number of calls (10-15 per week) validate its effectiveness. In addition, calls are received nationwide without the need to switch or refer calls. Some RSDs may shift Help Desk Phone/G-Mail support services to National Retiree Help Desk. | April 2016: Workgroup established. See workgroup feedback in "Discussion". Bob Hinds/CGNRC Co-Chairs to review/update CI 1800.5G and Retiree Services Program Training Guide & Resource Kit. | Planned: 3/30/2016 Actual: |
| 1a | CGNRC Priority #2 | CG RSDs: Hold Active Duty Commands accountable for integration and ownership of Retire Services Desks, as established and discussed in CI 1800.5G and Retiree Services Program Training Guide & Resource Kit. | Active Duty integration and ownership of Retire Services Desks. It is not enough for active duty commands to support the stand-up of Regional Service Desks, "check the box," and move on. Active duty commands need to be held accountable for ownership of their Retiree Service Desk | | Planned: 3/30/2016 Actual: |
| 1b | CGNRC Priority #3 CGNRC 2014-7 | CG RSDs/NRHD: Establish procedural consistency for all Retiree Service Desks and an effective network of desk volunteers. Provide strategies and share best practices regarding how to identify and recruit retiree volunteers to staff the desks. | RSD functions are defined in the RSD Training Guide (from Comdtinst 1800.5G). RSD Volunteer staff are encouraged to develop a referral reference library. There are Coast Guard Bases that are not located close to DOD Instalations which provide retiree support services. CG Base Alameda is among them. In the immediate San Francisco Bay Area the Coast Guard is the only material military establishment. I recommend that retiree services program support continue to be available to CG Base COs in such situations and that the Regional CG Retiree Councils and the local Base CO be allowed (encouraged) to develop Retiree Services in specific situations that bring a significant value to the retiree community. Among those elements to be considered are: Support to the TAPS program, Annual Informational All Military Services Seminars (RADs), Retiree decedent affairs support, and local support to the CG Retiree Help Desk. | | Planned: 3/30/2016 Actual: |
| 1c | CGNRC 2014-3 | CG RSDs/NRHD: Investigate and make a recommendation as to whether it is more effective/efficient to have the existing national retiree desk be replaced or augmented by regional desks. Include recommendations regarding staffing levels, clear roles and responsibilities, skills and training needed, institutionalizing support, and gaps/ redundancies that need to need addressed. | The National Help Desk is serving a useful purpose and is experiencing a significant number of calls and their function should remain unchanged, that those regions where the RSD's are functioning maintain them and in those regions where the statistics show little RSD activity, the role of the Councils should be expanded to carry out the gathering and dissemination of local information for the Retirees disseminated in a newsletter or responding to requests for the information. In other words, allow individual variation based on the situation at the individual regions, expanding the Council's role where appropriate. I think we agree, the RSP will not achieve it's anticipated role until the active duty retirees are integrated into the process, when the active duty member is within a year or two of retirement and there is an integrated handoff from the active duty command to the local RSO to assist the member retiring in "landing" at the location chosen for retirement. In that event, the RSO/RSD is an integrated part of the entire CG retirement process. ...a reason RSD's are receiving little, if any, workload is that there has been little publicity and that some work can be generated for them, like updating the National Help Desk operating instructions, gathering local information, etc. I don't see RSD's as picking up work piecemeal to justify their existence. | | Planned: 3/30/2016 Actual: |

ENCL: (1)

CGNRC PRIORITIES - PLAN OF ACTION & MILESTONES

Rev: 11/20/2015

| # | Source | Issue, Goal, Objective | Discussion | Planned Actions, *Milestones , Efforts, Status | Complete |
|----|--|--|---|--|--|
| 1d | CGNRC 2014-2 | CG RSDs/RRCs: Provide a standard framework for regional councils, including guidance on membership, roles and responsibilities, accountabilities, and processes. Standardization guidance should also be developed for both the active duty bases and the RSDs. | Some RSD activities can be transferred to or shared by Regional Councils and information disseminated via newsletter and/or Regional Council Web site. | | Planned: 3/30/2016 Actual: |
| 2 | CGNRC Priority #4 (CGNRC 2015-2) | Transition Assistance: Retiree information needs to be formally integrated into the separation out-processing for all retiring personnel and annuitants. This includes a CG Retiree presence at all CG TAP Seminars. | | April 2015: Work Group established to make recommendations on how to increase integration of retiree info into CG TAP. | Planned: 3/30/2016 Actual: |
| 2a | CGNRC 2013-7 | Transition Assistance: Develop a Standard Retiree Briefing Sheet. Once CG-1112 has collaborated with DoD to revise form DD-2648 "Pre-Separation Counseling Checklist" for service members, the new form should be made available through the CG retiree services website and routinely used during the transition to retirement. | | | Planned: 3/30/2016 Actual: |
| 2b | CGNRC 2013-8 | Transition Assistance: Develop a comprehensive list of CG retiree benefits, entitlements, privileges and rights. Pending. Once the RSP manager has coordinated with CG-111 to develop this list, it needs the widest possible dissemination throughout the CG retiree community. | | | Planned: 3/30/2016 Actual: |
| 2c | CGNRC 2014-6 | Transition Assistance: Increase the effectiveness of education for transitioning members regarding the selection of survivor benefits. | | | Planned: 3/30/2016 Actual: |
| 2d | CGNRC 2014-10 | Transition Assistance (Prepare for Retirement): Develop and widely distribute a comprehensive "career life-cycle track" that simply and clearly helps retirees understand milestone decision points along their career path, including which retirement decisions need to be made when. It is critical that this information be shared early with the retiring service member to facilitate and ensure a smooth, integrated transition into retirement. | CG-1112 is leading a workgroup in development of Military Lifecycle (MLC) plan to include enhancement of pre-separation/retirement transition. The RSP manager, as a member of the workgroup, will assist in development and distributon of appropriate pre-separation and retirement guidance. | | Planned: 3/30/2016 Actual: |

CGNRC PRIORITIES - PLAN OF ACTION & MILESTONES

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|----|-------------------|---|---|---|--|
| 3 | CGNRC Priority #5 | Retiree Caregivers: Promulgate and distribute a "Care Givers' Guide" for annuitants | This Guide is in addition to the CG PPC Survivors Guide. The Care Givers Guide should reflect DoD best practices and benefits, with widest possible dissemination throughout the CG retiree community, including a direct link to the CG retiree website. | RSP Manager will coordinate promulgation/distribution of CG Care Givers Guide. Kim Lorigan (CGNRC) will provide comment upon promulgation. | Planned: 3/30/2016 Actual: |
| 4 | CGNRC Priority #6 | Communications: Resolve how to most effectively and efficiently contact retirees, including legal and financial considerations (eMail vs mail addresses) | | Bob Hinds will work with CGNRC in development of Retiree Services Strategic Communications Plan, with strategy to acquire, distribute, and manage retiree e-mail addresses. | Planned: 3/30/2016 Actual: |
| 4a | CGNRC 2014-12 | Communications: Develop and execute a formal Communications Plan to increase program awareness, including messaging, media vehicles, and frequency. | | | Planned: 3/30/2016 Actual: |
| 4b | CGNRC 2014-15 | Communications: Establish a more effective communication and battle rhythm between the CGNRC and the regional councils, including: a. Publishing an annual cycle for identifying/reviewing/selecting issues and agenda items for the annual meeting; b. Organize and distribute read-aheads well in advance of the annual meeting; c. Discuss and develop recommendations to resolve issues at annual meeting (developing recommendations, rather than just identifying issues); d. Facilitate and simplify the process for security check-in for attendees at the annual meeting. Consider hosting a portion of the annual meeting at Joint Base Bolling to simplify logistics for attendees. | | | Planned: 3/30/2016 Actual: |
| 4c | CGNRC 2013-1 | Communications: Ensure proactive and effective communications with the Council Co-chairs on a regular basis for the partnership needed for planning and implementing an effective Retiree Services Program. Additionally recommend that RADM Day's relief meet with the Council Co-Chairs as part of the in-brief process to get up to speed on CG Retire Affairs issues and the CG retiree services program. | CG-13 has met with the Council Co-Chairs and facilitates regular open/positive communications through the Retiree Services Program Manager. | | Planned: 3/30/2016 Actual: |

CGNRC PRIORITIES - PLAN OF ACTION & MILESTONES

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| 4d | CGNRC 2014-14 | Communications: Develop and execute a plan to sustain and regularly refresh the CG retiree website. Institutionalize website support. | | | Planned: 3/30/2016 Actual: |
| 4e | CGNRC 2013-2 | Communications: Establish and sustain effective, two-way communications between the CG retiree community and CG retiree service providers. Ongoing and needs additional work. The possibility of a separate "CG Retiree Communications Work Group" to be re-evaluated after Final Operating Capability (FOC) is established in June 2014. | | | Planned: 3/30/2016 Actual: |
| 4f | CGNRC 2014-16 | Communications: Develop and execute a plan for CG 13 and both CGNRC Co-chairs to network closely with MOAA and its coalition of organizations. | CG-13 RSP Manager working with VA to explore possibility of CG/DoD retiree council co-chairs participating in the VA Secretary's regular breakfasts with VSOs. | | Planned: 3/30/2016 Actual: |
| 4g | CGNRC 2014-13 | Communications: Arrange for both CGNRC Co-chairs to attend/participate as CG representatives/observers to DoD's military services' retiree councils. | RADM Acton (CGNRC Co-Chair) to reach out to DoD Retiree Council counterparts | RADM Acton (CGNRC Co-Chair) to reach out to DoD Retiree Council counterparts | Planned: 3/30/2016 Actual: |
| 5 | CGNRC 2015-3 CGNRC 2015 Priority | Information/Data Management: Retiree services data/info provided to and collected from customers by the CG National Retiree Help Desk (NRHD) and Regional Retiree Services Desk (RSD) is inadequately captured, managed, and controlled for accuracy, consistency, security, analysis, and program decision making and resource allocation. | | Anna Carrie Ash to develop and place Retiree Data Capture Tool (RDCT) on CG Portal to capture, analyze, and manage retiree help desk data. Issue National Help Desk volunteers VOLAC. | Planned: 3/30/2016 Actual: |
| 5a | CGNRC 2014-4 | Information/Data Management: Develop a password-protected SharePoint site for use by CG National Retiree Council members. | | Anna Carrie Ash to develop and place SharePoint site on CG Portal. Issue CG Retiree Volunteers VOLAC. | Planned: 3/30/2016 Actual: |

CGNRC PRIORITIES - PLAN OF ACTION & MILESTONES

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|----|--------------|---|------------|--|--|
| 5b | CGNRC 2014-5 | Information/Data Management: Develop a password-protected source or a process (perhaps a document or website) that all Volunteer Directors and Active Duty Coordinators could use to pull retiree information in their AOR. This would help immensely with outreach and advertising our services. Note that there may be Personally Identifiable Information (PII) implications that need to be fully considered. | | | Planned: 3/30/2016 Actual: |
| 5c | CGNRC 2014-8 | Information/Data Management: Provide the necessary information access for desk volunteers: a. Develop a plan to provide desk volunteers with a Common Access Card (CAC) for access to standard CG workstations; b. Develop a database that contains the information a volunteer watchstander will need to access to provide the retiree with the right information; c. Determine whether desk volunteers may need access to Gmail; and d. Determine how desk volunteers acting virtually (from home rather than at CG base) can have access to the systems and information necessary to stand their watch. | | | Planned: 3/30/2016 Actual: |
| 5d | CGNRC 2014-9 | Information/Data Management: Develop and maintain a central repository for retiree inquiries received by the desks or website. Include a follow-up mechanism, such as a tickler-file. Address protecting personal information (PII) and cyber security concerns. | | | Planned: 3/30/2016 Actual: |
| 6 | CGNRC 2013-9 | Casualty & Decedent Affairs: CG-13 needs to work with PSC Chief of Casualty Matters to develop an annuitant & retiree decedent affairs program, with supporting materials. Need to provide awareness training for CG units supporting retiree decedent affairs. | | CG-13 RSP manager will coordinate with CG PSC-PSD Chief of Casualty Matters and PPC-RAS to make needed improvements to the decedent affairs program, supporting materials, and training and education. | Planned: 3/30/2016 Actual: |

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|----|---------------|---|--|---|--|
| 6a | CGNRC 2014-11 | <p>Casualty & Decedent Affairs: Increase educational efforts to help survivors/ annuitants better understand whatever benefits they may be entitled to, specifically targeting: Survivors – beneficiaries who are eligible to receive or are receiving, either the Survivor Benefit Plan (SBP) or the Retiree Serviceman’s Family Protection Plan (RSFPP). This includes children and insurable-interest beneficiaries; Surviving spouses not receiving pay – surviving spouses of sponsors who did not elect a benefit plan for their survivor or who are no longer eligible for SBP or the RSFPP, are eligible for some benefits under DEERS that are not found in the Survivor Pay Files.</p> | | | <p>Planned: 3/30/2016</p> <p>Actual:</p> |
| 7 | CGNRC 2014-17 | <p>Continued Service to Coast Guard: Identify/discuss/develop ways to leverage retiree skills, on a voluntary basis, to add value to active duty CG.</p> | <p>MCPOCG Skip Bowen, USCG (Ret), CGNRC Co-Chair led efforts in establishment of CG/FEMA Reserves Program.</p> | | <p>Planned: 3/30/2016</p> <p>Actual:</p> |

CG-13 Retiree Services Desk (RSD) Worksheet (Rev. 12/2015)

Ref: (a) CG Retiree Services Program, CI 1800.5G http://www.uscg.mil/directives/ci/1000-1999/CI_1800_5G.pdf
(b) RSP Training Guide & Resource Kit http://www.uscg.mil/retiree/docs/rsd/RSD_Training_Guide_Resource_Kit.pdf

| | |
|----------------------------|-------------------------|
| Date: | Sponsoring Unit: |
| Unit POC: | AD Coordinator: |
| Volunteer Director: | Other: |

1. Referrals, information, and outreach to the CG military retiree community

| | |
|---|---|
| Does RSD have a dedicated call-in phone #(e.g. 1-800) | Does RSD have a dedicated e-mail address (e.g. G-Mail)? |
|---|---|

| | |
|-------------------------------|-----------------------------------|
| Is RSD accessible on the web? | Does RSD distribute a newsletter? |
|-------------------------------|-----------------------------------|

Who monitors/responds to phone, e-mail, and walk-inquiries (e.g. volunteers, unit personnel)?

What are the total number and type of volunteers (e.g. CG retirees/annuitants, CG Auxiliary, DoD retirees)?

Describe challenges, lessons learned, and success in recruiting volunteers.

What are the estimated number and nature of inquiries from the CG military retiree community? Describe the feedback received from customers. (Attach Customer Service and Customer Feedback Logs, if available.)

Describe outreach to the CG retiree community (e.g. phone/e-mail) and level of participation in active duty events (e.g. CG Day) and affiliation with CG organizations (e.g. CGOA, CWOA, CPOA, CG Spouses) by the CG retiree community.

What contributions have the CG military retiree community made to active duty Coast Guard (e.g. volunteering in support of the RSD, MWR, CG programs/missions, and mentoring active duty members).

What are the key issues and areas of concern within the CG military retiree community?

CG-13 Retiree Services Desk (RSD) Worksheet (Rev. 12/2015)

2. Sponsoring Unit's Regional Retiree Council (RRC)

Name of RRC:

Describe the RSD's relationship and affiliation with RRC (e.g. collaboration in outreach to the CG military retiree community, RSD participation in RRC meetings, and partnership in recruiting volunteers for the RSD).

3. Relationship with DoD military Retiree Activity/Services Offices (RAOs/RSOs) and military retiree community.

Describe the RSD's relationship, affiliation, and communication with DoD Retiree Activity/Services Offices (RAOs/RSOs) and larger military retiree community, including governmental agencies and military coalition members.

4. General.

How would you assess the RSD's current level of alignment with policy/procedures set forth in CI 1800.5G and the RSP Training Guide & Resource Kit? What's working well? What are areas for improvement and what might be done to help bring about improvement in those areas?

What changes would you recommend to CI 1800.5G and RSP Training Guide & Resource Kit to better align RSD/RRC policy/procedures with the needs of the Coast Guard and CG military retiree community – within limited CG resources?

CG-13 Regional Retiree Council (RRC) Worksheet (Rev. 12/2015)

Ref: (a) CG Retiree Services Program, CI 1800.5G http://www.uscg.mil/directives/ci/1000-1999/CI_1800_5G.pdf
(b) RSP Training Guide & Resource Kit http://www.uscg.mil/retiree/docs/rsd/RSD_Training_Guide_Resource_Kit.pdf

| | |
|-------------------------------|--|
| Date: | RRC: |
| RRC Co-Chair: | RRC Co-Chair: |
| Sponsoring Unit: | RSD: |
| Is RRC accessible on the web? | Does RRC distribute a newsletter? |
| How often does the RRC meet? | Does RRC provide reports/input to RSD? |

Describe RRC membership, including total number and type of members (e.g. CG retirees, annuitants, DoD retirees).

Describe RRC outreach efforts, affiliation, and activities with the CG military retiree community.

What are the key issues and areas of concern within the CG military retiree community?

Describe the RRC's relationship and affiliation with Sponsoring Unit/RSD (e.g. collaboration in outreach to the CG military retiree community, RSD participation in RRC meetings, and partnership in recruiting volunteers for the RSD).

Describe the RRC's relationship, affiliation, and communication with DoD Retiree Activity/Services Offices (RAOs/RSOs), Retiree Councils, and larger military retiree community, including governmental agencies and military coalition members.

How would you assess the RRC's current level of alignment with policy/procedures set forth in CI 1800.5G and the RSP Training Guide & Resource Kit? What's working well? What are areas for improvement and what might be done to help bring about improvement in those areas?

What changes would you recommend to CI 1800.5G and RSP Training Guide & Resource Kit to better align RSD/RRC policy/procedures with the needs of the Coast Guard and CG military retiree community – within limited CG resources?