

U.S. Department of  
Homeland Security

United States  
Coast Guard



Commandant  
United States Coast Guard

2703 Martin Luther King Jr. Ave SE  
Washington, DC 20593-7801  
Staff Symbol: COMDT (CG-1D/13)  
Phone: (202) 475-5210  
Email: Donna.M.Navarro@uscg.mil

1800

## MEMORANDUM

From: Dr. D. M. Navarro CG-13  
Dr. Donna Mischell Navarro  
Digitally signed by Dr. Donna Mischell Navarro  
Date: 2023.01.30 07:21:19 -05'00'

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

To: RADM Jeff Hathaway, USCG (Ret)  
MCPO Lloyd Pierce, USCG (Ret)  
CG National Retiree Council Co-Chairs

Subj: CG NATIONAL RETIREE COUNCIL ANNUAL REPORT

Ref: (a) Coast Guard Retiree Services Program, COMDTINST 1800.5H  
(b) CG National Retiree Council Annual Report, 14 Nov 2022  
(c) CGNRC Co-Chair Meeting with CCG, 8 Dec 2022

1. In accordance with reference (a), as the Commandant's Executive Agent for the CG National Retiree Council (CGNRC), I want to thank you for your exceptional annual report and briefing with the Commandant (CCG), MCPOCG, DCMS-DPR, and me, references (b) and (c).

2. I commend the Council for *staying the course* throughout the COVID-19 pandemic, with Regional Retiree Councils (RRCs) remaining strong advocates for area retirees and the CGNRC conducting a highly productive hybrid in-person/virtual annual meeting in September 2022. Thanks to your leadership and sustained efforts, CG policy is being updated to reduce the maximum time to process *Audit Error Worksheets* from 120 to 90 days, in alignment with DoD. I also want to thank the Council for prompting improved guidance to retirees on the return of original health records to the CG, as well as continued attention to improving communications between the CG Pay & Personnel Center and our retiree community.

3. Please extend my appreciation to the entire CGNRC, including 19 RRCs, for their continued volunteer service to our retirees and the Coast Guard, including support of CG recruiting efforts – with retirees now eligible for financial incentives, thanks to the Council! I look forward to working with the Council in addressing its top priorities in the coming year and hosting the next annual meeting of the CGNRC at CG Headquarters in September 2023.

#

Copy: PSC/PPC  
CG-11  
DOL  
FORCECOM

DEPARTMENT OF HOMELAND SECURITY  
U.S. Coast Guard  
DIGEST

☐ APPROVAL

☐ SIGNATURE

☒ INFORMATION

From: CG-13 Dr. Donna Mischell Navarro  
Digitally signed by Dr. Donna Mischell Navarro  
Date: 2022.11.18 10:53:18 -05'00'

To: CCG *LLF* 21 Dec 22  
Thru: CG-1 *PENoyer.BRIAN.K.1091648721* 21 Dec 22  
DCMS-DPR *PENoyer.BRIAN.K.1091648721* 21 Dec 22  
DCMS *11/22*  
MCPOCG *11/28*  
VCG *20 Dec 22*

Subj: 2022 ANNUAL REPORT OF THE COAST GUARD NATIONAL RETIREE COUNCIL

1. Enclosed, please find the 2022 Annual Report of the Coast Guard National Retiree Council (CGNRC). The Council remains active in engaging our CG military retiree community and coordinating efforts with my office to fully implement policy promulgated in COMDTINST 1800.5H - within available resources.
2. As your Executive Agent, I will formally respond to the Council, thanking them for their continued dedicated efforts and this year's annual report. Council top priorities remain well aligned with the needs of the CG and our military retiree community.
3. I plan to join the CGNRC Co-Chairs for their annual meeting with you, MCPOCG, DCMS, and CG-1 on 8 Dec 2022 to discuss this report, including the Council's top priorities, for your feedback and direction.

SIGNER'S COMMENTS

Signer's Name:

U.S. Department of  
Homeland Security

United States  
Coast Guard



Commandant  
United States Coast Guard

2703 Martin Luther King Jr. Ave SE  
Washington, DC 20593-7801  
Staff Symbol: COMDT (CG-1D/13)  
Phone: (202) 475-5210  
Email: Donna.M.Navarro@uscg.mil

1800

## MEMORANDUM

Dr. Donna Mischell  
Navarro

Digitally signed by Dr. Donna  
Mischell Navarro  
Date: 2022.11.18 10:54:33 -05'00'

From: Dr. D. M. Navarro, SES  
CG-13

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

To: CCG *LL [Signature] 21 Dec 22*  
Thru: (1) CG-1 PENoyer.BRIAN.K.1091648721 Digitally signed by  
PENoyer.BRIAN.K.1091648721  
Date: 2022.11.25 13:22:52 -05'00'  
(2) DCMS-DPR PENoyer.BRIAN.K.1091648721 Digitally signed by  
PENoyer.BRIAN.K.1091648721  
Date: 2022.11.25 13:22:52 -05'00'  
(3) DCMS *[Signature] 11/22*  
(4) MCPOCG *[Signature] 11/28*  
(5) VCG

Subj: 2022 ANNUAL REPORT OF THE CG NATIONAL RETIREE COUNCIL

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

1. In accordance with reference (a), as your Executive Agent, I am pleased to forward the 2022 Annual Report of the Coast Guard National Retiree Council (CGNRC).
2. I will formally respond to the CGNRC, thanking them for this report and continued support in implementing policy promulgated in reference (a). The Council's priorities remain well aligned with the needs of the Coast Guard and our military retiree community.
3. I plan to join the CGNRC Co-Chairs for their annual meeting with you, MCPOCG, DCMS, and CG-1 on 8 Dec 2022 to discuss the report, including the Council's priorities, for your feedback and direction.

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Enclosure: (1) 2022 CGNRC Annual Report

Copy: CG-PSC-C  
CG-PPC  
DOL  
FC-C





U.S. COAST GUARD  
NATIONAL RETIREE COUNCIL  
RETIREE SERVICES PROGRAM (CG-1335)  
2703 MARTIN LUTHER KING JR. AVE SE  
WASHINGTON, DC 20593-7801

1800  
14 Nov 2022

## MEMORANDUM

From: RADM Jeffrey Hathaway, USCG (Ret.)  
MCPO Lloyd Pierce, USCG (Ret.) *REC for* Reply to: Robert Hinds  
Attn of: RSP Manager (CG-1335)

To: Commandant (CCG) *LLH 22 Dec 22*

Thru: (1) CG-13 *Dr. Donna*  
(2) CG-1 *PENNYER BRIAN K 10916487*  
(3) DCMS *11/21*  
(4) MCPOCG *11/28*  
(5) VCG *22 Dec 22*

Subj: 2022 ANNUAL REPORT OF THE CG NATIONAL RETIREE COUNCIL (CGNRC)

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

- 1) The Coast Guard National Retiree Council (CGNRC) held its 21st annual meeting on 7-8 September 2022. This years' annual meeting was conducted in a hybrid format with roughly half of our attendees in person at Coast Guard Headquarters and the remainder joining virtually utilizing Microsoft Teams. As co-chairs, we submit the following 2022 Annual Report for the CGNRC in accordance with reference (a).
- 2) BACKGROUND. The Council was established in 1982 and is comprised of the national co-chairs, members from 19 Regional Retiree Councils (RRC), and several at-large members. The co-chairs consist of one retired flag officer and one retired master chief petty officer. The Council is chartered as directed by reference (a) to represent more than 65,000 active duty and reserve retirees, including family members, annuitants, and survivors, and to:
  - a. Promote open and positive lines of communication between the Commandant and the retiree community through the Commandant's Executive Agent (CG-13); and
  - b. Inform CG leadership about ongoing retiree issues.

The Council meets annually to review the Retiree Services Program, address ongoing priorities and discuss retiree issues. Upon conclusion of the meeting, they report findings via the chain of command and directly out-brief senior leadership, including the Commandant.

- 3) This report was prepared by national co-chairs, RADM Jeff Hathaway (Ret.) and MCPO Lloyd Pierce (Ret.). Retiree community functions and meetings began to reappear in 2022 as COVID-19 restrictions began to ease. The fact that half of our regional retiree council leaders



attended our meeting in person gives a good indication of where our regional councils stand in returning to a normal "battle rhythm". This years' meeting agenda is provided in enclosure (1). The meeting included representatives from almost all RRCs, CG-13 staff, senior leaders, and several guest speakers. Names are contained in the CGNRC meeting minutes, included as enclosure (2). DoD national retiree councils also returned to in person meetings in 2022. MCPO Lloyd Pierce and Mr. Bob Hinds attended a portion of the DoN national retiree council meeting, held in August, and provided an update on CG national retiree council progress and priorities.

- 4) As can be seen in the meeting agenda, we addressed a broad range of issues in addition to updating RRCs on progress made on our current CGNRC priorities list for the CG Retiree Services Program. An updated list is provided as enclosure (3). The following items were highlighted during our CGNRC meeting:
  - a. **PPC Audit Error Worksheet (AEW) Processing** – The Commanding Officer of PPC, Captain Derek Smith, attended our entire conference and provided an insightful brief showing that AEW processing time is holding at a current average of 75 days, well below their current goal of 120 days. Since almost 50% of USCG retirees apply for Concurrent Retiree and Disability Pay (CDRP), approval of which requires AEW processing by PPC, your CGNRC hopes that the Coast Guard will establish a maximum 90 day processing goal for AEWs, which mirrors DoD's maximum processing time. Given the ongoing delays in digitizing health records of retiring members (addressed in d.) we are concerned that PPC may experience a flood of AEWs as some retirees, that were forced to delay applying for CDRP, are finally able to do so in the coming months. CGNRC will continue to closely monitor.
  - b. **PPC Responsiveness to Retiree Inquiries** – Captain Smith also briefed on the optimization of the Retiree & Annuitant Services Branch (RAS), in response to long standing retiree complaints regarding long delays or no replies to email or phone requests for assistance from PPC. A variety of system changes have been instituted that has resulted in a large decrease in retiree complaints. The RAS optimization study also concluded that about 30% of retiree/annuitant requests coming into PPC could be performed via Direct Access self service. PPC and your CGNRC are working together to better advertise this to our retiree/annuitant community. In fact, the Fall issue of the **The Long Blue Line** contains an easy to follow summary on how retirees can take control of their retired pay account. The CGNRC will continue to monitor the results of PPC-RAS improvements.
  - c. **Retiree Access to Health Records** – The Coast Guard continues to digitize a large backlog of Service Treatment Records (STRs) under a new contract. Once digitized, they can be electronically archived in a system that interfaces with the VA for disability claims processing. In the interim, some retirees have had to rely on getting a certified copy of their health record from their last servicing health clinic in order to support VA disability claims (almost 50% of CG retirees file for disability). The Coast Guard has issued guidance for members to make a copy of their health record before retirement accompanied by a DD-2963 certification. However, many retirees have reported trouble getting access to their STR in order to make a copy and then getting overworked clinics to issue the required DD-2963 certifying authenticity. Retirees that did not make a copy



of their STR prior to retiring have had an even harder time gaining access to their last servicing health clinic to perform this task. Until the backlog of electronic STR archiving is erased, the CGNRC requests that the Coast Guard supports a better process for members/retirees to get a certified paper copy of their STR, if still held at a CG clinic.

- d. **CG Retiree Assistance to USCG Recruiting Efforts** - The CG retiree community is well aware of the difficulty that all Services are having in recruiting future members. We spent a long discussion period with representatives from the CCG Incident Management Team and the CGRC to brainstorm how interested retirees could contribute to ongoing CG recruiting initiatives, without becoming a burden to those initiatives. One example that will be implemented is to connect the recruiting liaison at all large CG units with their closest RRC. That way RRCs can be kept aware of upcoming recruiting activities and those responsible can request retiree community support, if desired. Retirees are also aware that they are the largest part of our Long Blue Line that is ineligible to receive monetary compensation for identifying a new member that eventually enters Cape May. There appears to be legal hurdles to making retirees eligible for monetary compensation for individual recruiting efforts. However, your CGNRC feels that there would be much great "buy-in" from the retiree community if those legal hurdles could be resolved.
- e. **Retiree Strategic Communications** – Again, the Council received briefs from several Coast Guard and other service organizations in order to assess their connections and relevance to retirees. It is our intent to inform retirees of the benefits and opportunities available to them (retirees) through engagement with these organizations. **The Long Blue Line**, continues to receive rave reviews throughout our retiree community! The National Coast Guard Museum Association is producing a consistently high quality product in coordination with CG-13. The fact that a hard copy of the Long Blue Line is mailed to all retirees (unless a retiree otherwise directs) is a great benefit as we are still working on closing the gap of retiree/annuitant e-mail addresses contained in Direct Access (DA). Currently, about 60% of retirees/annuitants are listed in DA with e-mail addresses. We are continuing an "advertising" push to urge our retiree community to update e-mail addresses in DA, with CG-13 tracking closely. The "My CG" app has added a retiree section but, for now and by agreement, it simply links to the CG-13 Retiree Services website which, itself, requires updating for easier access and searching.
- f. **CG Retiree Mentoring/Final Sponsor Program** – Two pilot programs to connect retirees with retired/retiring individuals, and seeking different forms of assistance, have yielded some positive results. It has been difficult to truly assess the long term demand signal of such a program. However, we have been able to determine the type of assistance that our retirees may ask for and are willing to provide. The goal, at this point, is to create a low cost, self-registration software program that can be launched on a host website outside of the Coast Guard "firewall". It will allow retirees and transitioning retirees in search of assistance, the ability to view retirees that have registered and can offer assistance in a variety of areas. The software has been identified and is currently being tailored to best fit program needs.
- g. **Regional Retiree Councils** – Our Regional Retiree Councils (RRC) have done a good job in weathering COVID-19 restrictions over the last two years. We are hoping that in 2023, all are able to successfully reengage with interested CG retirees in their geographic

areas. As shared with CCG, the CGNRC requests that RRCs be provided a mechanism to initiate relationships with CG units in their immediate area. RRCs are currently limited by CI 1800.5H to sponsorship by Bases/TRACENs, often far from their location. CI 1800.5H additionally contains several ongoing and annual reporting requirements that will be reviewed for relevance. Since each RRC is rather unique in geography and the way they function, we don't want "standard" reporting requirements to stand in the way of individual RRCs best serving their members. We will continue to assist some of our RRCs that lack adequate volunteer leadership, regular communication with their active duty sponsor unit, or are having issues maintaining a connection to their geographic retiree community. The CGNRC and CG-13 continue to forge a strong relationship with both the Force Readiness Command (FORCECOM) and Director of Operational Logistics (DOL). Both show commitment to ensuring that Base and Training Center COs/XOs under their control that sponsor a RRC understand the importance of an active relationship and an attentive retiree services collateral duty officer. We currently have 19 standing RRCs. Efforts continue to charter a 20<sup>th</sup> RRC sponsored by Base LA/LB.

- 5) The National Retiree Council extends its gratitude for the enduring and strong support of the Retiree Services Program to the Commandant, DCMS, Assistant Commandant for Human Resources (CG-1), Director of Military Personnel (CG-13), Retiree Services Program Manager, Regional Retiree Council members, DOL, FORCECOM, Commanders of sponsoring Bases and TRACENs, and the CG Pay & Personnel Center, Retiree & Annuitant Services (PPC-RAS).

Enclosures: (1) CGNRC 2022 Meeting Agenda  
(2) CGNRC 2022 Meeting Minutes  
(3) CGNRC 2022 Priorities for the Retiree Services Program

Copy: CG-11, CG-PSC, CG-PPC, DOL, FORCECOM



## 2022 CGNRC MEETING AGENDA

### Key Goals/Objectives:

- Continue to focus on: (1) improving two-way communication with prospective and current retirees, and (2) ensuring all retirees are provided an opportunity to connect with and support one another, their community, and the CG.
- Support CG Recruiting (e.g. *Everyone is a Recruiter*, *MCPOCG Recruiting Challenge*).
- Assess/support development of Retiree Mentoring Program.
- Address current issues, as described below.

### Current Issues:

- In Dec 2021, CCG committed to reducing the maximum time to process Audit Error Worksheets (AEWs) from 120 to 90 days, in parity with DoD, supporting more timely payment of Concurrent Retired & Disability Pay. CO PPC will provide AEW update.
- Retirees are expressing difficulties in getting timely, needed assistance from CG PPC. CO PPC will provide update on Retiree & Annuitant Services (RAS) Optimization.
- Transitioning members are expressing difficulties in getting certified health records needed for VA claims. CG HSWL will provide update on Health Records.
- More than 300 CG retirees have volunteered to support active-duty members in making the transition back to civilian life. CG Mentoring Program website “firewall” issues are preventing retirees from connecting directly with transitioning members. These issues will be addressed, including potential solutions (e.g. *memberplanet*).
- Many of our 19 Regional Retiree Councils are questioning their viability. Challenges in connecting with area retirees due to COVID are further exacerbated by a lack of access to retiree e-mail addresses. These issues will be addressed.

**Subj: 2022 Annual Report of the CGNRC**

<b>Wednesday, 7 Sep (Day One)</b> <b>CGHQ Ray Evans Room A</b>					
<b>Start</b>	<b>End</b>	<b>Min/Hrs</b>	<b>Activity</b>	<b>Speaker/Facilitator</b>	<b>Remarks</b>
0800	0815	15	Meeting Kick-Off, Goals	RADM Hathaway MCPO Pierce	CGNRC Co-Chairs
0815	0830	15	DCMS Welcome, Update	VADM Thomas (DCMS)	
0830	0845	15	CG-1 Welcome, Update	RADM Penoyer (Prospective CG-1)	
0845	0900	15	CG-13 Welcome, Update	CAPT Williams (Acting CG-13)	
Break (5 Min)					
0905	0935	30	National Retiree Help Desk Update	CAPT Bernstein (NRHD)	
0935	1035	60	CG PPC Update, including AEWs	CAPT Smith (CO PPC)	
Break (5 Min)					
1040	1100	20	CG Recruiting Update	CAPT Dash (PSC/IMT)	
1100	1120	20	CPOA/MCPOCG Recruiting Challenge	Jon Ostrowski	
1120	1140	20	CG Academy Admissions Partner	Katy Robbins (CGA)	
1140	1200	20	CGNRC/RRC Recruiting Support	CGNRC Co-Chairs	
Lunch Break (60 Min)					
1300	1330	30	CG Health Records Update	CWO Longstreet, HSC Vazquez (HSWL)	
1330	1400	30	VFW Pre-Discharge/VA Claims	Mark Barrett (VFW)	
Break (5 Min)					
1405	1435	30	MOAA Legislative Update	Paul Frost	
1435	1505	30	The Military Coalition Update	Randy Reid	
Break (5 Min)					
1510	1610	60	CG Mentoring Program, Retiree Mentoring, <i>memberplanet</i> tool <a href="https://www.memberplanet.com/#/">https://www.memberplanet.com/#/</a>	Carl Boehmer, Robert Miller, Bob Hinds, Jon Ostrowski	
1610	1630	20	1 <sup>st</sup> Day Wrap-Up	CGRC Co-Chairs	
1630	1730	20	CGNRC Reception	Hosted by DCMS	CGHQ Ceremonial Entrance

**Subj: 2022 Annual Report of the CGNRC**

Thursday, 8 Sep (Day Two) CGHQ Ray Evans Room A					
Start	End	Min/Hrs	Activity	Speaker/Facilitator	Remarks
0800	0815	15	1 <sup>st</sup> Day Recap, 2 <sup>ND</sup> Day Overview	CGNRC Co-Chairs	
0815	0830	15	Travel Claims	Bob Hinds	
0830	0900	30	CG Retiree Services Program, CI 1800.5H Review/Update	Bob Hinds	
0900	0930	30	CG Retiree Services Website Review/Plans	Bob Hinds	
Break (5 Min)					
0935	1015	40	DOL/Bases & FC/TRACENs Update	CAPT Sundland (Base NCR) CMC Lewis (FC)	Breaks as needed
1015	1035	20	Regional Retiree Councils Update	RRC Chairs	
1035	1200	85	CGNRC/RRC Issues, Priorities, Initiatives	CGNRC Co-Chairs	
Lunch Break (50 Min)					
1300	1400	60	Commandant/MCPOCG Update	ADM Fagan (CCG) MCPOCG Jones	<b>All seated by 1250</b>
1400	1600	2 Hours	CGNRC/RRC Issues, Priorities, Initiatives	CGNRC Co-Chairs	Breaks as needed
1600	1630	30	Meeting Wrap-Up, Action Items, Out-Brief with CG-13/CG-1	CGNRC Co-Chairs CAPT Williams (CG-13D) Bob Hinds	



**2022 CGNRC Annual Meeting (7-8 Sep)**  
**Meeting Minutes**

**Highlights.** The CGNRC Annual Meeting, hosted by Director of Military Personnel (CG-13), the Commandant's Executive Agent for the Council was held in a hybrid format. 13 of the 19 Regional Retiree Councils participated, with seven represented in-person and six virtually. All meeting participants/presenters and volunteers who provided logistics support are listed on last page. The meeting was highly successful, having achieved the goals/objectives and addressed key issues in the meeting agenda, and as reflected in meeting surveys. Meeting presentations (PPTs) are posted at the CG Retiree Services website at: [www.dcms.uscg.mil/retiree](http://www.dcms.uscg.mil/retiree) .

**Day One – 7 September**  
(Approximate Times)

**0830 – 0835:** RADM Jeff Hathaway and MCPO Lloyd Pierce, CGNRC Co-Chairs, kicked-off the meeting, thanking Council members and all for their participation. .

**0835 – 0850:** VADM Paul Thomas (DCMS) welcomed the CGNRC, provided update on DCMS initiatives, and pledged his continued support for the Council and retiree community.

**0850 – 0905:** RADM Brian Penoyer (Prospective CG-1) welcomed the CGNRC, provided an update on CG-1 initiatives, pledged his continued support for the Council and retiree community – challenging all to step-up in continued support of the CG.

**0905 – 0920:** CAPT Tony Williams (Acting CG-13) welcomed the CGNRC, thanked Dr. Donna Mischell Navarro (Acting CG-1) for her leadership, and pledged his continued support for the Council and retiree community, and provided a Military Personnel (CG-13) update. See PPT.

**0920 – 0940: CG National Retiree Help Desk (NRHD)** – RADM Hathaway highlighted that the CG is the only Service with a NRHD. CAPT David Bernstein, USCG (Ret), Capital Area Retiree Council (CARC) provided a NRHD update. See PPT.

**0940– 1000: CGNRC Co-Chairs**

- ADM Hathaway underscored the importance of volunteering in support of the NRHD and its value to RRCs and their constituents. He also noted the NRHD offers a useful model for the emerging Retiree Mentoring Program.
- ADM Hathaway shared that CCG accepted his and MCPO Pierce's offer to extend their tenures as Council Co-Chairs for another year, following "stalled" COVID period, maintaining a staggered departure (2023 for ADM Hathaway, 2024 for MCPO Pierce).
- ADM Hathaway reflected on "Why we have a Council." Most retirees have a strong affinity for the CG and camaraderie with AD members and retirees – the *Long Blue Line*. The CGNRC/RRCs help to maintain that important life-long relationship.
- MCPO Pierce apologized for participating virtually as he recovers from an injury. He highlighted the large number of retirees in Tampa Bay, FL area and conveyed important

messages to the Council and retirees – *We need to show up; pay attention politically, get counted and be heard, understand and guard our benefits, join a military coalition, and network.* MCPO Pierce noted the low number of Veterans in Congress, underscoring importance of *MOAA, The Military Coalition*, and other Veterans organizations.

**1005 – 1100: CG Pay & Personnel Center (PPC)** – CAPT Derek Smith (CO PPC) provided an update on PPC optimization efforts, as highlighted below. See PPT.

- NDAA moved CG military retiree pay from operational funds, subject to annual budget, to *DoD Military Retirement Trust Fund*, assuring retiree pay for +60K CG retirees.
- PPC is optimizing antiquated tools. Reprogrammed 10 military billets to RAS.
- Average AEW processing time is 75 days. PPC is working to better automate/streamline AEW process during next 12 months, reducing touch points/errors. **Following which, PPC will work with CG-13 to codify 90 Days as maximum time to process AEWs.**
- PPC Decision Memo (30 findings) targeted three areas for improvement: (1) VA Compensation; (2) New Accessions (e.g. RET-2 to RET-1); and (3) Deceased Clams.
- PPC is the *Servicing Personnel Office (SPO)* for CG military retirees.
- **PPC has RAPIDS (ID card) site dedicated to CG retirees, administered by Ms. Patricia Freeman. PPC will provide phone number for publication in LBL.**
- *Customer Response Team* and *Case Management System* improving customer service.
- Calls go through *Customer Care Branch*, farmed out to *Tier Tickets* with response times.
- Pushing *Self-Service* options, as published in *Long Blue Line* and posted at PPC website.
- **PPC would like to create a quasi-partnership with NRHD/CG Retiree Services in early identification of small problems, before they become large ones.**
- Shifting to *Perceptive Content (iPERMS)*, digitizing docs, for better access/security.
- **PPC will provide “one-pager” on reporting the death of retirees & annuitants.**
- **RADM Hathaway asked if backlog of CG Retiree Health Records awaiting digitization might result in landslide of AEWs for PPC. CAPT Smith will research.**
- **RADM Hathaway asked if PPC was still planning to update their website. CAPT Smith said that it is on his worklist for the upcoming year.**

**1100 – 1135: CG Recruiting** – CAPT Rusty Dash, CG Recruiting IMT, provided an update on CG efforts, with the following highlights.

- Noted paradox. Growing the CG on paper and building ships at a rate greater than any period since WWII, but the number of people serving in the CG is going down.
- CG Recruiting Challenges...
  - U.S. Aging Population (By 2035, project more people over 65 than 18 and under)
  - U.S. Labor Scarcity (12M open jobs, up from 5M five years ago)
  - 20% of population qualified for military service, 11% with propensity to serve.
  - Alignment with changing “Expectation of Work” (e.g. Remote Work)
- 1,400 short of annual recruiting target of 4,200 – “consequences are dire.”



## Subj: 2022 Annual Report of the CGNRC

- Commandant #1 Intent – *Transform our Total Workforce*, first priority “Fix Recruiting.”
- *Three Lines of Effort*: (1) *Generate More Leads* (**discussed with CGNRC**); (2) *Improve Recruiting Process* (e.g. Maintain contact, use new *Mobile App*); (3) *Increase Capacity of CGRC* (100 recruiters eliminated in sequestration; currently 250 production recruiters).
- **CAPT Dash continues in efforts to allow CG Retirees to receive cash award for recruiting (currently \$500).**
- O-6 Commands with +100 personnel are assigned *CG Recruiting Liaisons*, who will be hosting regular recruiting events in their communities.
- **CAPT Dash asked the CGNRC to support CG Recruiting events (+70 per month).**
- **List of CG Recruiting Liaisons provided to RRCs. RRC POCs will be provided to CG Recruiting Liaisons.**
- **CAPT Dash suggested retirees place phone number for local CG Recruiting Office in their cell phone and pass along to prospective recruits.**
- CAPT Dash facilitated Q&A – Recognized need to improve recruiter training and recruiting events. Medical waivers being granted to help with recruiting. CG is providing operational assets to support recruiting. Can’t send CG Recruiters to Boy Scout events (under 18 years old). *Mobile App* will help to recruit target population.
- RADM Hathaway shared that the Council would discuss ways to support recruiting.

**1135 – 1200: CPOA/MCPOCG Recruiting Challenge** – Mr. John Ostrowski, SCPO, USCG (Ret), CPOA President, provided a CPOA update, with the following highlights.

- CPOA/CGEA: 12,000 members, up from 10,000 in 2018, thanks to CGEA.
- 53<sup>rd</sup> CPOA/21<sup>st</sup> CGEA Convention, Aug 2022, 65% AD/35% Retiree participation.
- MCPOCG addressed two subjects: Suicide Prevention and CG Recruiting.
- SCPO Ostrowski spent nine years in CG Recruiting, strongly supports recruiting efforts.
- CPOA initiatives in support of CG Recruiting...
  - Retirees have been denied access to CG Bases while attempting to visit with prospective recruits. MCPOCG will address this issue.
  - Plans to place tear-out wallet size recruiting cards in *Chief's Magazine*. **Bob Hinds will research doing same in *The Long Blue Line*.**
  - Encouraging retirees to wear CG apparel as recruiting tool.
  - Helping to “Get the Word Out” on CG Recruiting events, placing notices in *Chief's Magazine*. **Bob Hinds will research doing same in *The Long Blue Line*.**
  - Encouraging CGRC to leverage high-performing retired CG recruiters.
- CPOA implementing new membership software (*memberplanet*) which may be a useful tool for the CG Retiree Mentoring Program.

**1200 – 1230: CG Academy** – Ms. Katy Robins, CG Academy, provided presentation on the *CGA Admissions Partner Program* and *Academy Minority Outreach Team (AMOT)*, highlighting opportunities for retirees to become CGA Admissions Partners. See PPT.

Enclosure (2)



**1315 – 1345: CG Health Records** – CWO Kelly Longstreet and HSC Yamil Vazquez Mori (HSWL) provided an update on efforts to digitize/upload CG Health Records into the *Health Artifact and Image Management Solution (HAIMS)*, as highlighted below. See PPT.

- As of Aug 2022, there were 6,372 open Service Treatment Record (STR) disposition cases (i.e. separated/retired members); 6,488 STR received by DLA Service Provider; 3,739 Digitized; 2,557 uploaded to HAIMS. 3,931 awaiting upload to HAIMS.
- CWO Longstreet/HSC Vazquez provided general guidance on procedures for getting CG Health Records into the system for digitization/upload to HAIMS, acquiring certified copies of Health Records for submission to VA, and returning original records to the CG.
- **Subsequent to the presentation, HSWL asked Bob Hinds (CG Retiree Services) to withhold guidance to retirees pending HSWL development of formal action plan, which will be provided to the Council, transitioning members, and retirees.**

**1345 – 1415: VFW Pre Separation/VA Clams** – Mr. Mark Barrett, VFW Associate Director for Field Operation, is responsible for the 11 National VFW sites that handle Pre-Separation claims. He also interfaces with 56 VA Regional Offices world-wide. Mr. Barrett provided a highly informative briefing on the VA Pre-Separation/Post-Service claims process. See PPT.

**1415 – 1500: MOAA Legislative Update** – MOAA is a key advocate and lobbyist in Congress on legislative and other issues of importance to military Veterans/Retirees. The CGNRC strongly encourages retirees to affiliate with MOAA. Mr. Paul Frost (MOAA), CAPT USN (Ret), provided a highly informative MOAA Legislative update. See PPT.

**1500 – 1515: The Military Coalition** – *The Military Coalition (TMC)*, comprised of 35 organizations and 5.5M members, is also a key advocate and lobbyist in Congress on legislative and other issues of importance to Veterans/Retirees. The CGNRC strongly encourages retirees to affiliate with *TMC*. Mr. Randy Reid, CWO, USCG (Ret), *TMC* Treasurer, provided a highly informative *TMC* update. See PPT.

**1515 – 1615: CG Retiree Mentoring Program** – RADM Hathaway facilitated discussion on efforts to formalize a CG Retiree Mentoring Program, providing a web-based platform for transitioning members and retirees to connect in mentor/sponsor relationships.

- Bob Hinds (CG Retiree Services) shared background on the mentoring initiative.
  - Capital Area Retiree Council proposed retiree mentoring program several years ago, subsequently launching pilot program in the Capital Area. Mr. Robert Miller, Base NCR, administers the program, connecting area retirees and transitioning members.
  - In Dec 2021, Bob Hinds (CG Retiree Services) invited +24K retirees to help pilot a Retiree Mentoring Program, serving as volunteer mentors for transitioning members. +300 CG retirees (E5-O9) volunteered.

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- In Dec 2021, RADM Hathaway asked CCG if the new CG Mentoring Program could be expanded to include CG military retirees, overcoming current firewall issues.
- Mr. Carl Boehmer (CG Mentoring Program) and Bob Hinds (CG Retirees Services) hosted a virtual meeting with retirees and posted list of retiree volunteer mentors at the CG Mentoring Program website, accessible to active duty members.
- Carl Boehmer and MCPO Brynn Simonetti (CGRC) provided a brief on *MemberPlanet*, potential platform for the CG Retiree Mentoring Program.
- The Council discussed related issues, including the roles of retirees as mentors/sponsors in supporting transitioning members and software requirements.
- RADM Hathaway will research and provide feedback on web-based tools supporting needed self-service connections between active duty members and retirees.

**1615:** RADM Hathaway adjourned the meeting and invited participants to the CGNRC reception hosted by DCMS in the CGHQ Ceremonial Entrance.

**Day Two – 8 September**  
(Approximate Times)

**0800 - 0805:** RADM Hathaway kicked-off the meeting.

**0805 – 0905: CG Retiree Services Program, CI 1800.5H** – Bob Hinds/RADM Hathaway facilitated discussion on policy regarding CGNRC/RRCs, with the following highlights.

- Some RRCs have asked “why do we exist,” “what are we supposed to do”?
- RADM Hathaway highlighted the primary job of the CGNRC/RRCs is to serve as the voice of 60K retirees back to CCG. How we gather the tenor, issues, and health of the retiree community is up to the CGNRC/RRCs.
- C1800.5G (2013) placed heavy demand on Bases/TRACENs (e.g. Retiree Help Desks, Trained Volunteers). CI 1800.5H reduced demand, now with only AD Retiree Services Coordinators at Bases/TRACENs and centralized CG National Retiree Help Desk.
- RADM Hathaway noted that some requirements of CI 1800.5H (e.g. RRC annual reports) aren’t of primary concern, sharing that the Council has an opportunity to rewrite policy to better reflect what is expected of RRCs.
- Comments from Council members: We need retiree “volunteers” who are passionate about supporting other retirees. 75% of RRCs appear to just be “clubs.” The CG needs to better communicate/support RRC requirements. RRCs work best that do what they’re inclined/equipped to do. Policy needs to reflect individualism/flexibility among RRCs. Some RRCs don’t receive any communication from their Base/TRACEN sponsors. Some RRCs (e.g. NW, Northern California, Charleston, Miami, and Yorktown) have excellent relationships with their sponsor units. Retirees need better access to CG units and opportunities to network – *Open the Gates*. Need universal value for RRCs. RRCs can



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augment the Transition Assistance Program in supporting transitioning members and their spouses. RRCs need to focus on ways to support their sponsoring units.

- **RADM Hathaway will work with MCPO Pierce/Bob Hinds to review/update policy, increasing individualism of RRCs and reducing administrative demands, and will provide recommended changes to CI 1800.5H.**

**0905 – 0915: CG Retiree Services Program Website** – Bob Hinds/RADM Hathaway asked the Council to take a thoughtful look at the website and provide recommendations on how to better organize information. Links to RRC websites will continue to be posted at this website.

**0925 – 1000: DOL/BASES and FC/TRACENs** – CAPT Joe Sundland (CO, Base NCR) and MCPO Ed Lewis (CMC FC) provided an update on Bases/TRACENs and hosted discussion on how DOL/FC can best support the CGNRC/RRCs.

**1000 – 1100:** Regional Retiree Councils (RRCs) provided an update on their activities, issues, and best practices.

**1015 – 1200:** CGNRC Chairs facilitated continued discussion on CGNRC/RRC support of CG Recruiting efforts and Council priorities, including CG Retiree Mentoring.

**1300 – 1400:** ADM Fagan (CCG) and MCPOCG Jones thanked the CGNRC for their support of the CG and retiree community, pledged their continued support of the CGNRC, and provided an annual update, with the following highlights.

- 100 Day Action Plan on track. “Tomorrow looks different. So will we.”
- *Transform Our Total Workforce* – CG workforce is highest priority. We will transform the way we hire, inspire, and develop our people. CG Recruiting is most important.
- *Sharpen Our Competitive Edge* – Know the end goal, with future view on technology.
- *Advance Our Mission Excellence* – Transcend geographic grounding of resourcing and capability.
- Challenged retirees to support CG Recruiting – “We are the most humble servants in the world” “Tell our story”
- **RADM Hathaway/MCPO Pierce suggested that RRCs be provided a mechanism to initiate relationships with CG units in their local area. RRCs are currently limited by CI 1800.5H to sponsorship by Bases/TRACENs, often far from their location.**

**1400 – 1545:** CGNRC Chairs facilitated continued discussion on CGNRC/RRC support of CG Recruiting efforts and Council priorities, including CG Retiree Mentoring.

**1545 – 1600:** CAPT Williams thanked the CGNRC for conducting a highly successful meeting. RADM Hathaway and MCPO Pierce thanked CG leadership for hosting the meeting and evening reception, volunteer Project Officers (LT Maddie Heist and YNCS Jennifer Hassan) and escorts, and all meeting participants/presenters, and adjourned the meeting.



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**Meeting Participants**

**CGNRC Members Participating In-Person** (Retirees)

<b><u>No</u></b>	<b><u>Name</u></b>	<b><u>Council</u></b>
1	RADM Jeff Hathaway	CGNRC Co-Chair
2	CAPT David Bernstein	Capital Area
3	CAPT David Cinalli	Miami, FL
4	CWO Ray Bryant	Charleston, SC
5	MCPO David Swanson	Northern CA
6	MCPO David Bunch	Yorktown, VA
7	CPO Anthony Lim	Hawaii
8	CPO Jose Baltar	San Juan, PR

**CGNRC Members Participating Virtually** (Retirees)

<b><u>No</u></b>	<b><u>Name</u></b>	<b><u>Council/Role</u></b>
1	MCPO Lloyd Pierce	CGNRC Co-Chair
2	Ms. Lula Carpenter	Annuitant-At-Large
3	RADM Bert Kinghorn, LCDR Phil Johnson	Northwest (Seattle)
4	CDR Don Goldstein, MCPO LeRoy Dennison	Tampa Bay, FL
5	CDR Glenn Galman	Northern CA
6	CWO Jeff Rosenberg	Pensacola, FL; East AL
7	MCPO Bobby Wester	Jacksonville, FL
8	MCPO Keith Livingstone	St. Louis, MO
9	SCPO Charlie Womack	Mobile, AL (Central Gulf Coast)

**Other Participants/Presenters**

<b><u>No</u></b>	<b><u>Name</u></b>	<b><u>Organization</u></b>
1	ADM Linda Fagan	Commandant (CCG)
2	MCPOCG Heath Jones	MCPOCG
3	VADM Paul Thomas	DCMS
4	RADM Brian Penoyer	Prospective CG-1
5	CAPT Tony Williams	Acting CG-13
6	CAPT Monique Roebuck	CG-133
7	CAPT Derek Smith	CO PPC (PPC staff participated virtually)
8	CAPT Rusty Dash	PSC/Recruiting IMT
9	CAPT Paul Frost, USN (Ret)	MOAA
10	CAPT Joseph Sundland	CO Base NCR
11	MCPO Ed Lewis	CMC FORCECOM
12	Mr. Mark Barrett	VFW Assoc. Director
13	Mr. Carl Boehmer	CG Mentoring Program
14	CWO2 Randy Reid, USCG (Ret)	The Military Coalition
15	CWO Kelly Longstreet	CG HSWL
16	HSC Yamil Vazquez Mori	CG HSWL
17	MCPO Cynthia Moneda	Base Alameda
18	SCPO Jon Ostrowski, USCG (Ret)	President CPOA
19	Mr. Bob Hinds	CG Retiree Services (CG-1335)

**Volunteer Logistics Support** – **Project Officers:** LT Maddie Heist (CG-1331), YNCS Jennifer Hassan (CG-1332). **Escorts:** ENS David Denmark (CG-1B3), Ms. Lisa Johnson (CG-1112)

### 2022 CGNRC Priorities for the CG Retiree Services Program

Item	Priority	Objective	Discussion	Action/Responsibility/Dates
1	1	Reduce max processing time of Audit Error Worksheets (AEWs) from 120 to 90 days.	PPC has eliminated the long standing backlog of AEW processing from over a year to a current average of 75 days.	Action: The current PPC goal for AEW processing is a max of 120 days. The CGNRC requests that maximum processing time be set at 90 days to comport with DoD max target. CGNRC will continue to monitor AEW processing. Ongoing.
2	1	Promote distribution of certified copy of health records to retirees filing VA disability claims	CG continues to digitize backlog of STRs for electronic archiving to system that interfaces with VA for disability claims processing. Some retiring/retired members must still utilize a certified paper copy of their STR to support disability applications	Action: Request CG support member/retiree process of getting a certified paper copy of their STR if still held at a CG clinic until backlog of electronic archiving is erased. CGNRC will continue to monitor. Ongoing
3	1	Provide CG retiree community support to ongoing USCG recruiting efforts.	At 2022 NCGRC meeting, discussed with CGRC and CCG IMT, ways RRCs could connect with and support USCG recruiting activities.	Action: Foster and highlight examples of CG retiree community support to CGRC and large unit recruiting activities. Ongoing
4	1	Better integrate Retiree Services Program (RSP) into Coast Guard Transition Assistance Program (TAP).	Ensure transitioning members are appropriately informed of RSP services. Better leverage CG Transition Seminars, (Transition Goals, Plans, and Success) in messaging RSP to transitioning members.	Action: Continue distributing RSP Guide (Tri-Fold) at TAP Seminars and e-mailing to active duty members with retirement orders. Engage RRCs in TAP Seminars. Continue providing feedback received from retiree community on TAP effectiveness to transition assistance program staff. Ongoing.
5	1	Create and launch permanent retiree mentoring/transition assistance website	Pilot programs over last two years have resulted in several successful retiree helping retiree examples. Best long term solution is a self-registration program launched on a website outside the CG firewall.	Action: CGNRC pursuing no cost/low cost solutions that will require only authentication of retired/retiring member after self registration before posting/access to data allowed. Ongoing
6	2	Continue to improve communications to CG retiree community. Implement CG Retiree Communications Strategy and validate effectiveness.	Communication is the single most important activity of the CGNRC/RRCs, ensuring effective communication with retirees & annuitants, sponsoring active duty units, retiree services organizations, and other retiree services providers.	Action: CGNRC work with CG-13 to continuously evaluate CG Retiree Communications Strategy, leveraging CG communications systems (e.g. <i>Long Blue Line</i> , <i>MyCG</i> )
7	2	Better standardize RRC structure & procedures, as published in the RRC Guide	The RRC Guide supplements CI 1800.5H with additional guidance/tools to better standardize RRCs and strengthen their relationship with sponsor units and retirees in their AOR. However, some current mandatory reporting requirements might not be required.	Action: CG-13/CGNRC/RRCs continue to better standardize RRC structure & procedures, as published in the RRC Guide. Evaluate removing reporting requirements of little value. Review progress at 2023 CGNRC meeting. Ongoing.
8	3	Ensure Retiree & Annuitant volunteerism is appropriately recognized.	Modest, but timely CG active duty recognition of retiree volunteerism is consistent with CG Core Values and strengthens the Long Blue Line.	Action: CG-13 continues to promote & facilitate CG active duty recognition of retiree & annuitant volunteerism – as also supported by CCG/DCMS.