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## Ombudsman Checklist for Command Cadre

**Purpose:** The purpose of this checklist is to provide a quick reference of items to accomplish when implementing the Ombudsman Program at your unit. This checklist is NOT all-inclusive, but addresses key items in appointment and support of a unit ombudsman. Please refer to COMDTINST 1750.4 (series), Coast Guard Ombudsman Program, Para 5.I, to review the full list of responsibilities for Commanding Officers/Officers-in-Charge and to obtain additional guidance on the Ombudsman Program.

**NOTE:** The primary goal of the Ombudsman Program is for every member and their families to have access to an ombudsman. If your unit is large or geographically dispersed, consider appointing multiple ombudsmen to ensure all unit members and their families have access to an Ombudsman

Obtain completed application from the prospective ombudsman.

Inform prospective ombudsman that the information on page one of the application will be used for Family Advocacy Central Registry verification.

Submit application to Family Advocacy Specialist (FAS) for Family Advocacy Central Registry check.

Provide an appointment letter to the ombudsman and welcome them to the command.

Ensure sections I and II of the Volunteer Agreement Form (DD 2793) are complete and signed by the ombudsman and the Accepting Official (i.e., commanding officer, officer-in-charge, or command designee).

Brief ombudsman on CO priorities and expectations, confidentiality, and mandated reportables and any additional issues that should be reported.

Provide name, telephone number and e-mail address of the command POC (including underway POC in homeport) to the ombudsman.

Complete/verify registration and assignment of commanding officer, officer-in-charge, or command designee in the Ombudsman Registry.

Register and assign the ombudsman to the unit in the Ombudsman Registry.

Provide a copy of the application CG 6078, DD 2793, and appointment letter to HSWL W-L Ombudsman Coordinator. The ombudsman coordinator is \_\_\_\_\_.

Ensure ombudsman is aware of required trainings (i.e., Online Core training and Coast Guard Ombudsman training or suitable substitute) and how they can be accessed and completed.

Provide ombudsman with a nametag and business cards.

Establish a funding line in the budget for ombudsman expenses.

Meet with ombudsman routinely (e.g., weekly, monthly, or quarterly).

Advise ombudsman on confidentiality requirements for newsletters, unit Facebook page, e-mails, and other social media. For additional information, the PAO is \_\_\_\_\_.

Introduce the ombudsman at command all-hands and family events.

Verify completion of online Core Training within four weeks of receiving access and ensure proof of completion is provided to the ombudsman coordinator.

Verify completion of CG Ombudsman Training (CGOT) or suitable equivalent within three months of appointment. Provide (via CG approved methods of transmission) updated unit rosters, augmented with family information.

Advise the ombudsman on when and where to submit pre-authorized expenditures using expense form (SF1164) and verify submission.

Advise the ombudsman on their role in crisis, exercises, drills, and evacuations and invite the ombudsman to participate in unit training, drills, and/or exercises routinely.

Review monthly reports in the Ombudsman Registry and mark as “final” prior to the 10<sup>th</sup> of the following month.

Place ombudsman on the unit distribution list, to receive invitations to all-hands/training and pre-deployment needed.

Recognize the ombudsman at appropriate functions (e.g., unit luncheon, reception, all-hands meeting, ombudsman training, or other appropriate gathering) or by other means (e.g., letter of recognition, a certificate of performance, special mention in a unit newsletter, a Swivel Shot submission, nomination for the Wanda Allen-Yearout Ombudsman of the Year Award) for their contributions and support to the unit.

Ensure ombudsman resigns in writing upon completion of duties and a copy of the letter is provided to the ombudsman coordinator.