

# **PY13 RPM-1 OVERVIEW PRESENTATION: Boards & Panels, Reserve Status, and the Officer Evaluation System**



**Coast Guard Personnel Service Center**

**Reserve Personnel Management Division**



# Topics

- ▣ Reserve Program Management
- ▣ Selection Boards & Panels
- ▣ Reserve Component Overview
- ▣ Reserve Component Standards
- ▣ Lateral Changes & ERAA Process
- ▣ Retirement – Ret-1 vs. Ret-2
- ▣ Waivers



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# Topics

- ▣ Officer Evaluation System Basics
- ▣ Important Tips
- ▣ Q & A



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# Reserve Program Management

- RPM-1 (**Reserve Component Category Management Branch**)
  - Status
  - OES
  - Boards & Panels
- RPM-2
  - Assignments
- RPM-3
  - IRR members
  - VA Educational Benefits
  - Medical Waivers/ Holds / Boards

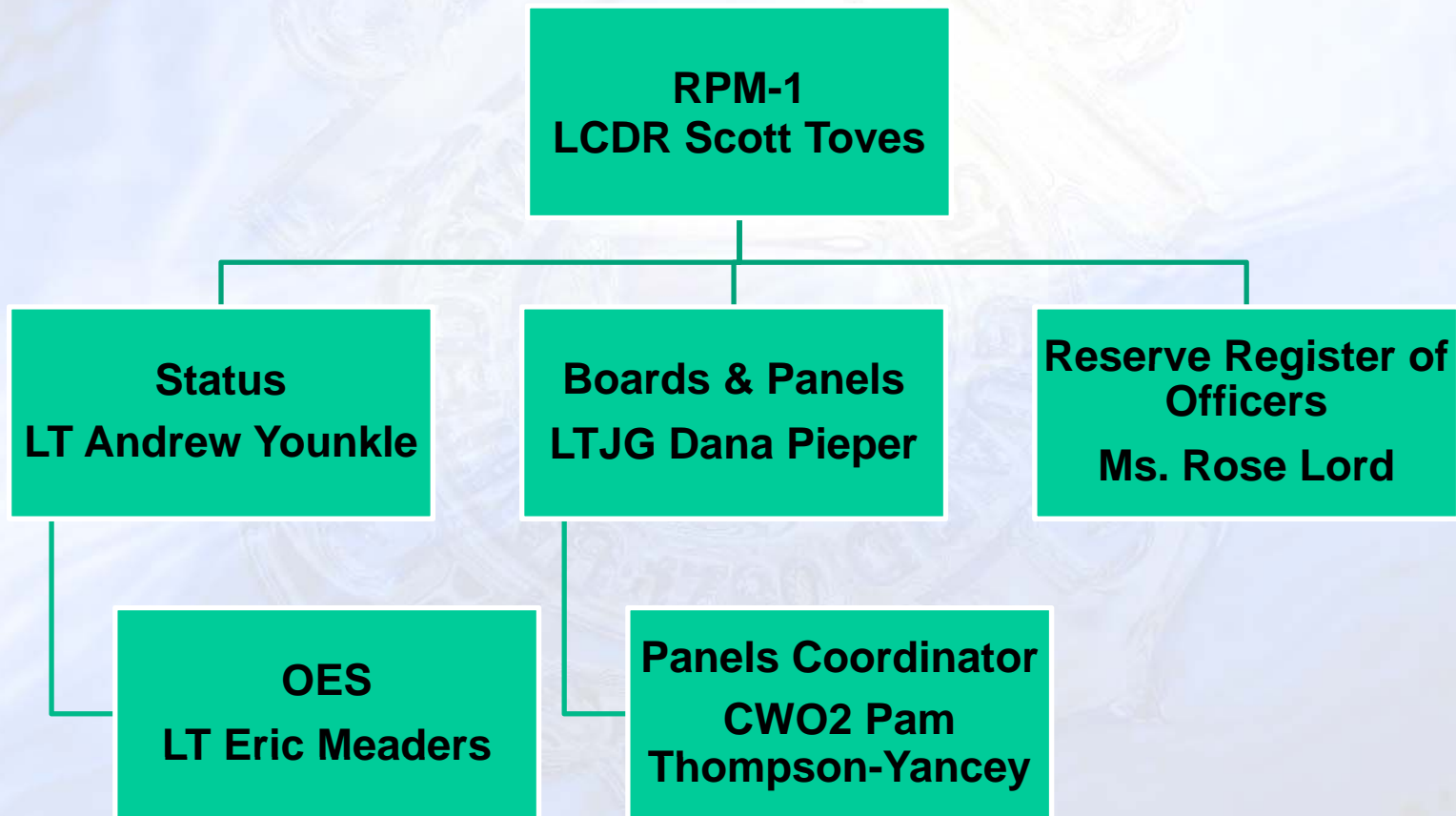
[www.uscg.mil/rpm](http://www.uscg.mil/rpm)

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# RPM-1 Reserve Officers



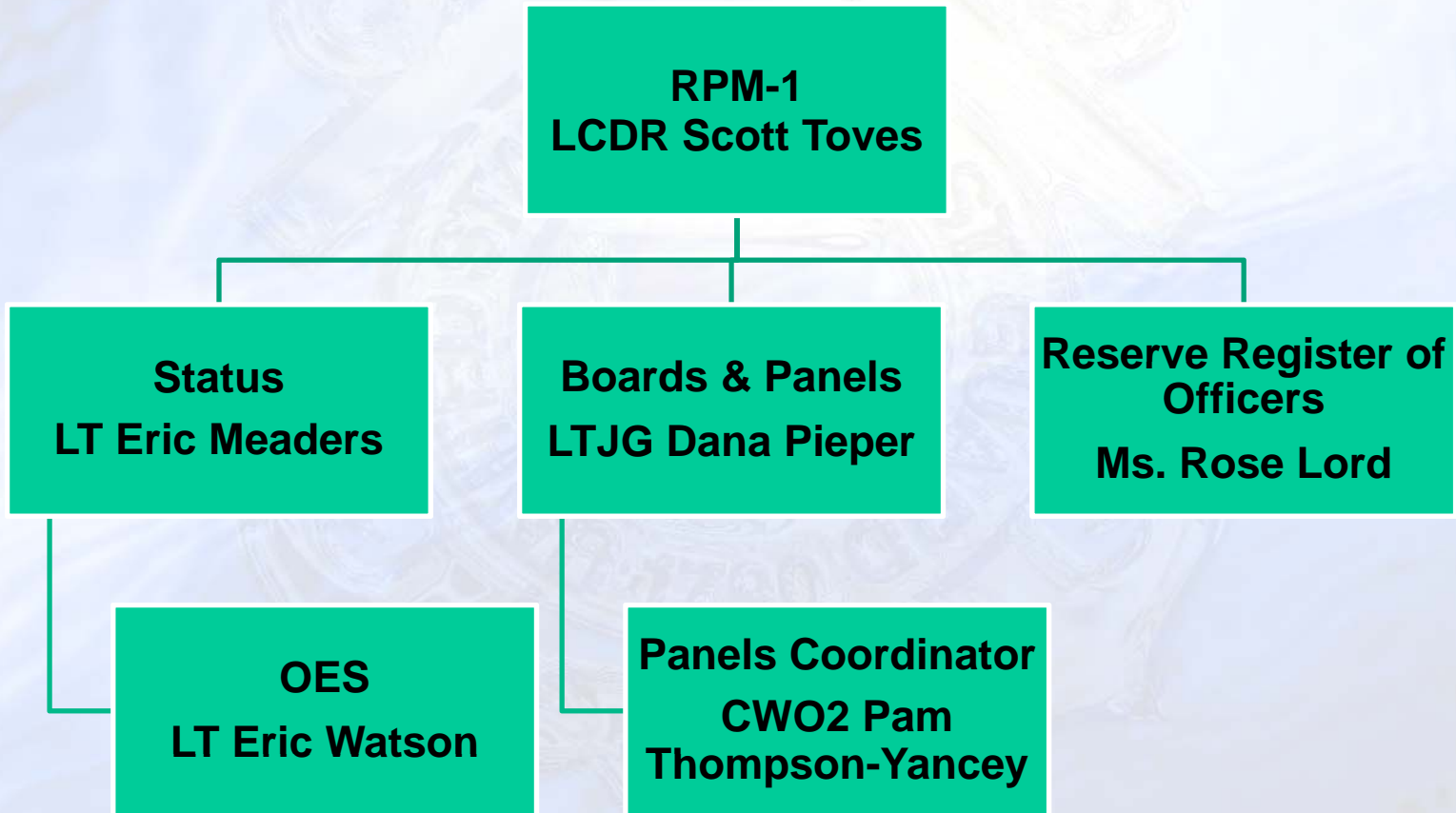
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# RPM-1 (AFTER 01JUL12)



[www.uscg.mil/rpm](http://www.uscg.mil/rpm)

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# The Promotion Cycle

**Candidate Message  
(Who is In Zone)**

- 30 Days before the Board

**Annual Kick Off Message for all Boards**

- February

**Board Convenes**

**Selection Message**

- Approx 6 weeks after board

**OPAL Message**

- Beginning of each month

Review your record from PSC-PSD-mr 3 months before your board  
[www.uscg.mil/psd/mr](http://www.uscg.mil/psd/mr)

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# Promotion Basics

- A Promotion Year runs from July 1 to June 30
  - Example: PY 2013 runs from July 1, 2012 to June 30, 2013
- Based on the Register of Reserve Officers
- Boards are a closed process based on matters of record, focused on. . .
  - OERs
  - Updated CG-4082
  - Employee Summary Sheet (ESS)
  - Reserve Points Statement



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# What Recent Boards are Saying

- Factors that place officers at risk
  - Core values and 8H violations
  - Alcohol incidents
  - Overweight
  - Fail to qualify
  - Lack of job diversity/geographic diversity
  - Excessive staff tours/no ops or field support tours
  - Nothing out of specialty (broadened specialist)

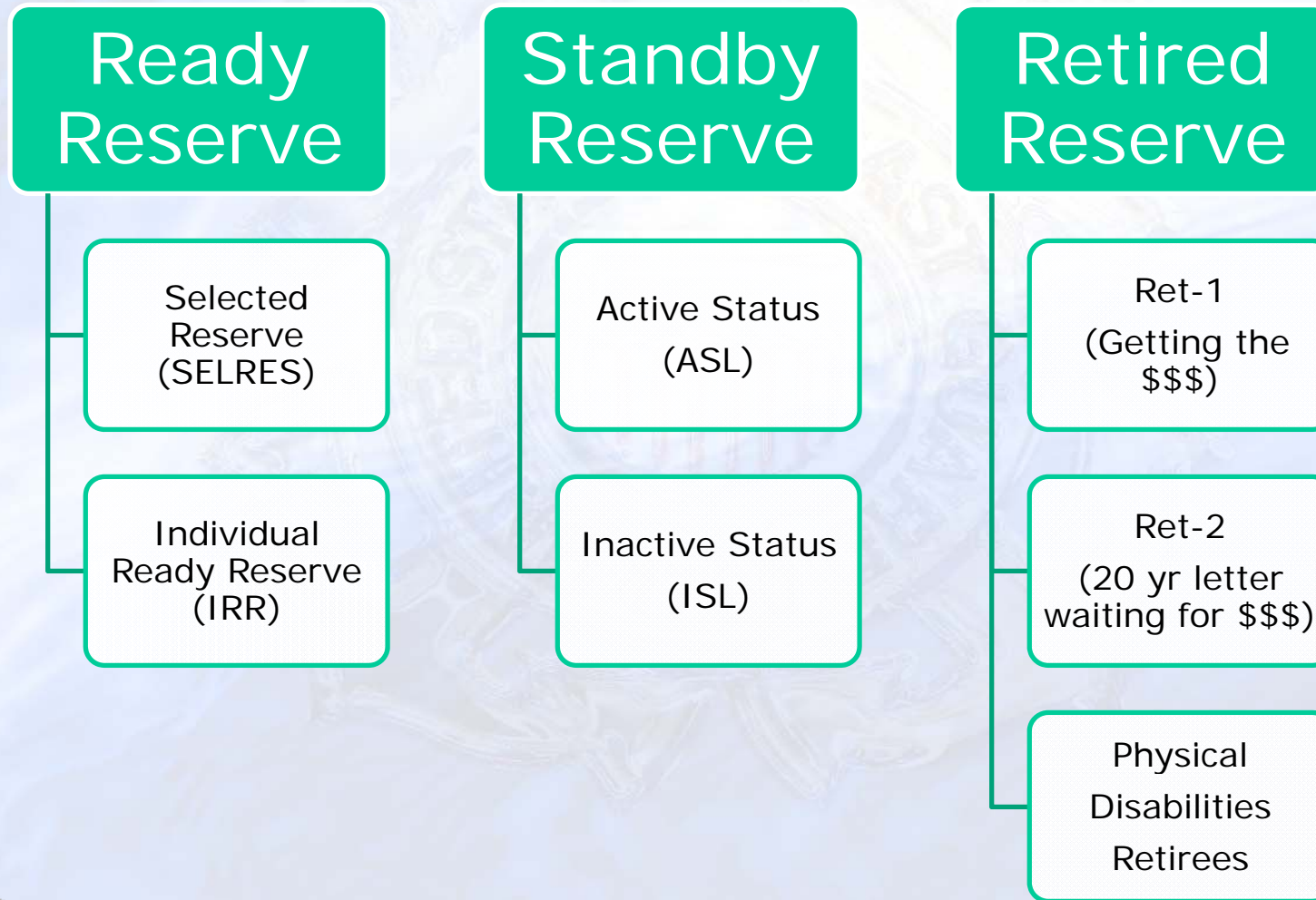


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# CG Reserve



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## CHANGE IN RESERVE COMPONENT CATEGORY (RCC)

**MEMBER:** Fill out and forward to your Command. For retirement request, use form CG-2055A.

**COMMAND:** Please email completed form with any required documentation to

[ARL-PF-CGPSC-RPM-Query@uscg.mil](mailto:ARL-PF-CGPSC-RPM-Query@uscg.mil)

EMPLID	Name (Last, First, MI)	Current Unit
Rank	Primary Email Address	Primary Contact Phone
Current Category (Check one)		Date of Request
SELRES <input type="checkbox"/> IRR <input type="checkbox"/> ISL <input type="checkbox"/> ASL <input type="checkbox"/>		Request Change to (Check one) <input style="width: 100px; height: 20px;" type="text"/>
SELRES <input type="checkbox"/> IRR <input type="checkbox"/> ISL <input type="checkbox"/> ASL <input type="checkbox"/>		SELRES <input type="checkbox"/> IRR <input type="checkbox"/> ISL <input type="checkbox"/> ASL <input type="checkbox"/>
Date of last USCG PHA/ physical exam:	Do you have any medical conditions that might affect your ability to serve in USCG Reserve?    YES <input type="checkbox"/> NO <input type="checkbox"/>	
Date of last USCG weigh-in:	Were you in compliance? YES <input type="checkbox"/> NO <input type="checkbox"/>	Are you currently in ISL due to weight? YES <input type="checkbox"/> NO <input type="checkbox"/>



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# SELRES Standards

- Attend 90% of IDT drills
- Satisfy Annual Training (AT) requirement
- Respond to official correspondence
  - (ex: ASQ)
- Maintain PF/Wt standards & uniforms
- (Officers) minimum of 50 pts in AY



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# IRR Standards

- Respond to official correspondence (ex: ASQ)
- Maintain PF/Wt standards & uniforms
- Voluntarily participate in IDT or ADT (Pts only)
- May perform ADOS or RMP for pay
- Must accrue 50 points each AY



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# Standby Reserve Standards

- ASL
  - May participate in reserve training activities without pay, may earn retirement points, and are eligible for promotion
- ISL
  - May **not** go before a board or be promoted
  - Are **not** eligible to accrue retirement pts

**In the Standby Reserves GI Bill benefits are SUSPENDED**

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# Lateral Changes

- Updated form and guidance on: [www.uscg.mil/psc/rpm/rpm1](http://www.uscg.mil/psc/rpm/rpm1)
- Package (form, ESS, & documentation) completed by member
- Routed through Chain of Command & DXR
- Submitted to PSC-RPM-1 who will verify package completeness and route to RFMCs



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## LATERAL CHANGE REQUEST

**MEMBER:** Fill out page 1 of this form and forward, along with **all supporting documents & your ESS**, to your Command for endorsement.

**COMMAND:** Endorse page 2 and submit form, along with all supporting documents and member's ESS, to DXR.

**DXR:** Endorse page 2 and forward, through ISTT if member is AD, to RPM-1 at ARL-PF-CGPSC-rpm-Query@USCG.mil.

**REFERENCE:** Reserve Policy Manual M1001.28A Chapter 7.C.9

EMPLID	Name (Last, First, MI)	Date Submitted
Rank	Primary E-mail Address	Primary Phone Contact
Date of enlistment:		Expiration of obligated service:
Current Rate:	Expiration of obligated service:	
Number of months served in the present rating:		
New rating requested, e.g., YN, FS, etc.:		
Reason for Request:		

Correspondence courses successfully completed. (ATTACH DOCUMENTATION)



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# Ret 1 vs. Ret 2

- ret receiving pay
- Must have 20yr letter
- CG 2055A - 45 days
- Age 60 or approved for Early RET-1
- ret awaiting pay
- Must have 20yr letter
- CG 2055A 90 to 120 days



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# Early RET-1

- greater than 90 days of active duty during any fiscal year since 28 Jan 2008
- 90 day aggregates of AD will be subtracted from 60<sup>th</sup> birthday
- Can go no earlier than 50<sup>th</sup> birthday



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<http://www.uscg.mil/rpm/rpm1/1618Request.asp>

# WAIVERS

## 16-18yrs

- Initiated by member's command
- Sent to RPM
  - Considerations: funding and FTE Cap manager
  - Guidance found on RPM-1 website and in *ALCGPSC 132/11*
- Final Decision - RPM

## 30 year

- Initiated by member's command
- Sent to RPM
  - Considerations: by this member staying is it affecting another member from obtaining a billet who does not have 30yrs
- Final Decision -RPM



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# OER Basics

## OAEP COMDTINST M1000.3

### CHAP 5

U.S. Department of  
Homeland Security

United States  
Coast Guard



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# Officer Accessions, Evaluations, and Promotions

COMDTINST M1000.3  
September 2011



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# OES: Purpose

- Provide info for personnel management decisions
- Set performance & character standards
- Prescribe organizational values
- Provide feedback for officer performance

Promotions, Assignments, Career Development, & Retention

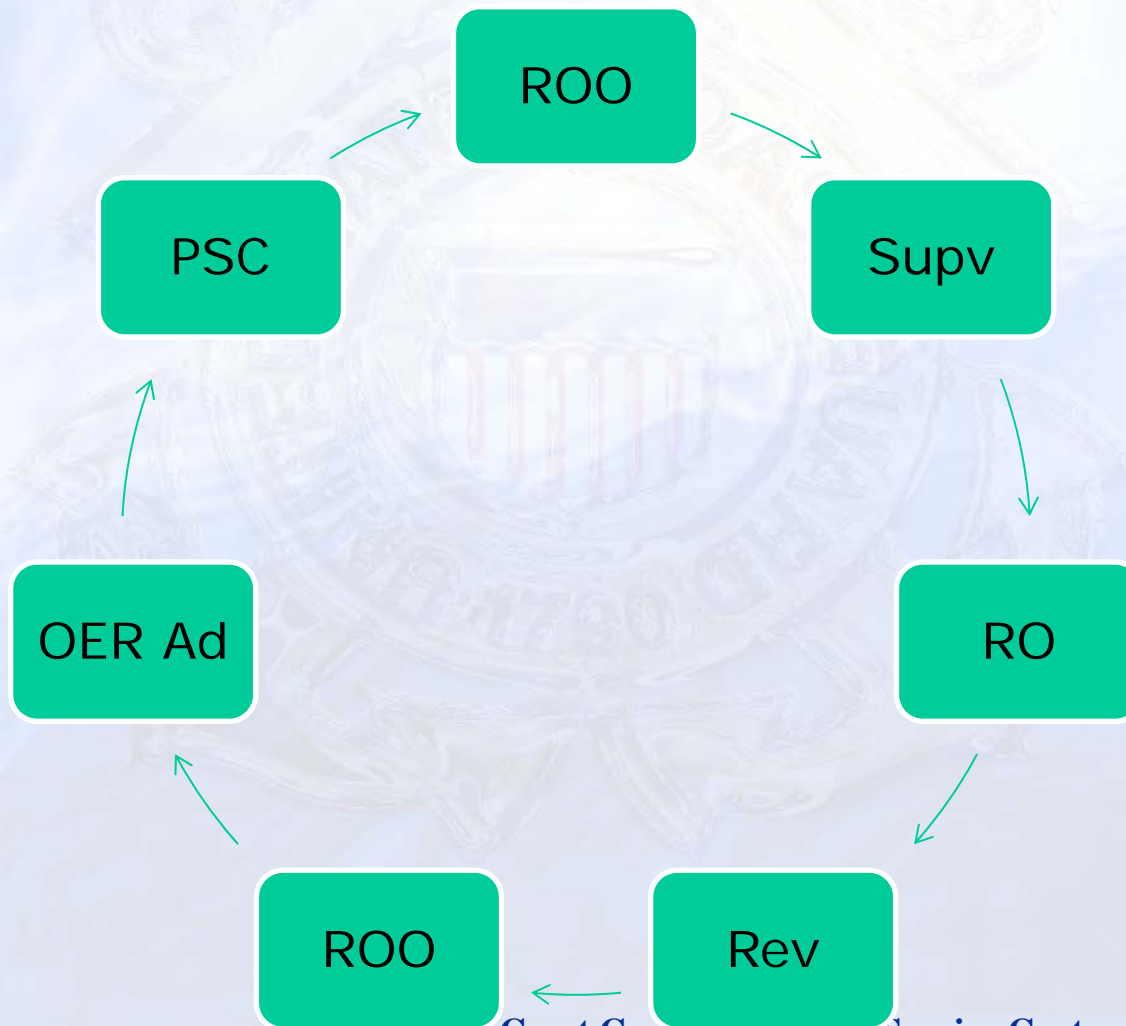


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# OER Process Order



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# OER Regular Submissions

GRADE	EVEN YEARS	IL	IDPL
Captain		il	April (Annual)
Commander		ch	March (Biennial)
Lieutenant Commander		il	April (Biennial)
Lieutenant		il	May (Biennial)
Lieutenant (Junior Grade)	January and July (In zone/above zone promotion board eligible)	il	July (Annual)
Chief Warrant Officer (W2)		il	June

**ABOVE & IN ZONE  
CANDIDATES  
CANNOT DELAY  
OERS**

**NOTE  
DATE  
CHANGE**



# Which schedule? IDPL vs ADPL

- Difference between schedule and list
- Reserve Officers are on the ADPL schedule if:
  - On EAD
  - ADOS greater than 180 Days
  - Invol Recall at original unit > 6 months
  - Invol Recall at new unit > 92 days
- Most all other officers are on the IDPL schedule



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# OER: ROO Responsibility

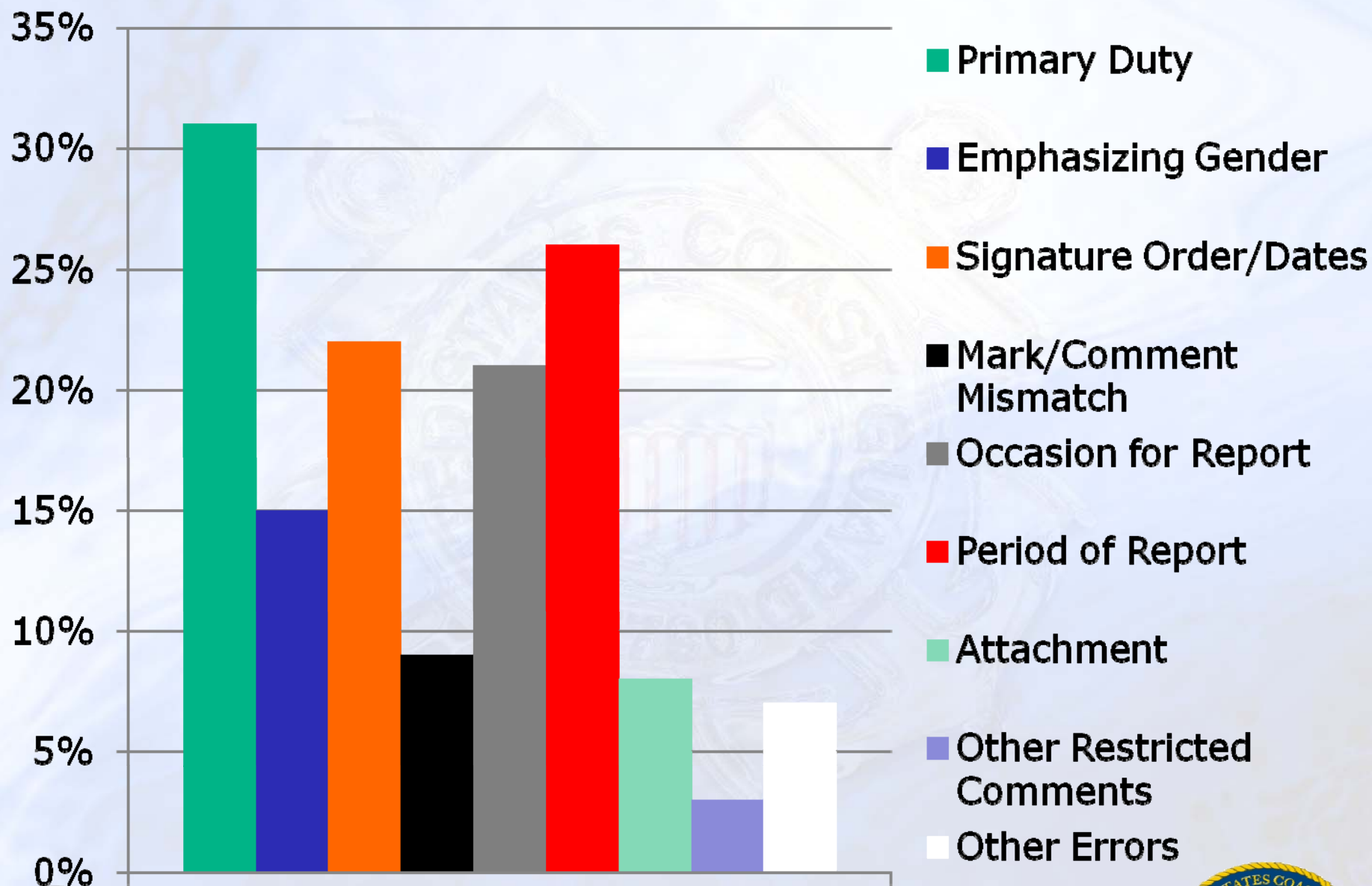
- Seek performance feedback
- Complete Sections 1 & 13 of OER
- May submit OSF
- Ensure no gaps or overlaps in OERs
- Sign OER after Reviewer (CWO-04)
- Ask questions – it's your career



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## ERRORS ON OERs VALIDATED IN 2011

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Please fill out the following form. Highlight Fields

U.S. DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD CG-5310A (Rev. 02-09)		<b>OFFICER EVALUATION REPORT (OER)</b>			Validation:		
<b>1. ADMINISTRATIVE DATA</b>		I understand my signature below does not constitute agreement or disagreement. I acknowledge I have reviewed this report.				(YYYY/MM/DD)	(YYYY/MM/DD)
a. NAME (Last)	(Initials)	b. Reported-on Officer Signature		c. DATE OF RANK	d. DATE REPORTED		
e. UNIT	f. EMPLID	g. GRADE	h. ATU - OPFAC	i. DAYS NOT OBSERVED			
j. PERIOD OF REPORT (YYYY/MM/DD)		k. OCCASION FOR REPORT (Mark only one)		l. EXCEPTION REPORT		m. DATE SUBMITTED	
/ / TO / /		<input type="radio"/> Annual/ <input type="radio"/> Semiannual <input type="radio"/> Detachment/Change of Reporting Officer <input type="radio"/> Detachment of Officer <input type="radio"/> Promotion		<input type="radio"/> Special <input type="radio"/> Concurrent		/ /	
<b>2. DESCRIPTION OF DUTIES:</b> List primary duty and summarize all duties and responsibilities (provide Reserve time if applicable).							
PRIMARY DUTY:							
<p>5310A – CWO to O2</p> <p>5310B – O3 &amp; O4</p> <p>5310C – O5</p> <p>5310D – O6</p>							
ATTACHMENTS:							
<b>3. PERFORMANCE OF DUTIES:</b> Measures an officer's ability to manage and to get things done.							
a. <b>PLANNING AND PREPAREDNESS</b>	1	2	3	4	5	6 7 NO	
Ability to anticipate, determine goals, identify relevant information, set priorities and deadlines, and create a	Got caught by the unexpected; appeared to be controlled by events. Set vague or unrealistic goals. Used unreasonable criteria to set priorities and deadlines. Rarely had plan of action. Failed to focus on relevant information.			Consistently prepared. Set high but realistic goals. Used sound criteria to set priorities and deadlines. Used quality tools and processes to develop action plans. Identified key information. Kept supervisors and stakeholders informed.			
				Exceptional preparation. Always looked beyond immediate events or problems. Skillfully balanced competing demands. Developed strategies with contingency plans. Assessed all aspects of problems, including underlying issues and impact.			

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ALL

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				LV	OTHER
j. PERIOD OF REPORT (YYYY/MM/DD)	k. OCCASION FOR REPORT (Mark only one)		l. EXCEPTION REPORT		
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<b>2. DESCRIPTION OF DUTIES:</b> List primary duty and summarize all duties and responsibilities (provide Reserve time if applicable).					
PRIMARY DUTY:					
LEAVE BLANK!					
ATTACHMENTS:					
<b>3. PERFORMANCE OF DUTIES:</b> Measures an officer's ability to manage and to get things done.					
a. <b>PLANNING AND PREPAREDNESS</b>	1	2	3	4	5
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					7 NO

# Potential OER Triggering Events

- Regular Schedule (Annual, Semiannual, or Biennial)
- Detachment/Change of RO
- Detachment of ROO (Transfer)
- Promotion
- Completion of S-T ADOS (ADOS 60-180 days)
- In Zone
- Going before a board
- Significant Discipline Event
- Continuity (res CWO4, IRR, or Ret)

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<b>2. DESCRIPTION OF DUTIES:</b> List primary duty and summarize all duties and responsibilities (provide Reserve time if applicable).							
PRIMARY DUTY:							
Date OER submitted to the Supervisor – the first time							
ATTACHMENTS:							
<b>3. PERFORMANCE OF DUTIES:</b> Measures an officer's ability to manage and to get things done.							
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j. PERIOD OF REPORT (YYYYMMDD) / / TO / /	k. OCCASION FOR REPORT (Mark only one) <input type="radio"/> Annual/ Semianual <input type="radio"/> Detachment/Change of Reporting Officer <input type="radio"/> Detachment of Officer <input type="radio"/> Promotion		l. EXCEPTION REPORT <input type="radio"/> Special <input type="radio"/> Concurrent		m. DATE SUBMITTED / /
<b>2. DESCRIPTION OF DUTIES:</b> List primary duty and summarize all duties and responsibilities (provide Reserve time if applicable).					
PRIMARY DUTY:					
<p>GET FROM DIRECT ACCESS</p> <ul style="list-style-type: none"> <li>• DATE REPORTED IS DATE ASSIGNED IN DA <b>NOT</b> DATE REPORTED ABOARD IN PERSON</li> <li>• Primary Duty block – <b>MUST</b> match RPAL (DA)</li> </ul>					
ATTACHMENTS:					
<b>3. PERFORMANCE OF DUTIES:</b> Measures an officer's ability to manage and to get things done.					
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Done Unknown Zone

Start RPM- Officer Evaluation ... http://www.uscg.mil/... 8:43 AM

# Assignment/Duty Mismatch

ALL CAPS

**2. DESCRIPTION OF DUTIES:** List primary duty and summarize all duties

PRIMARY DUTY: **MARINE INSP/PSCO-JRNYMAN**

Marine Insp/PSCO-Jrnyman / Chief Reserve Logistics

Text Box Format: WHAT'S IN DA / ACTUAL



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<b>2. DESCRIPTION OF DUTIES:</b> List primary duty and summarize all duties and responsibilities (provide Reserve time if applicable).							
PRIMARY DUTY:							
<i>(IDPL MUST Include Reserve Participation in the Following Format:)</i>							
<p>ADOS not ADSW</p> <p>ATTACHMENTS: <span style="border: 2px solid red; border-radius: 50%; padding: 5px; display: inline-block;">IDT Scheduled/Attended: XX/XX; ADT: XX Days; ADOS: XX Days</span></p>							
<b>3. PERFORMANCE OF DUTIES:</b> Measures an officer's ability to manage and to get things done.							
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<b>2. DESCRIPTION OF DUTIES:</b> List primary duty and summarize all duties and responsibilities (provide Reserve time if applicable).							
PRIMARY DUTY:							
<p>ex: Punitive Letters of Censure or Court Memoranda</p> <p><b>AWARDS ARE NO LONGER AUTHORIZED ATTACHMENTS</b></p>							
ATTACHMENTS:							
<b>3. PERFORMANCE OF DUTIES:</b> Measures an officer's ability to manage and to get things done.							
a. <b>PLANNING AND PREPAREDNESS</b>	1 Got caught by the unexpected; appeared to be controlled by events. Set vague or unrealistic goals. Used unreasonable criteria to set priorities and deadlines. Rarely had plan of action. Failed to focus on relevant information.	3 Consistently prepared. Set high but realistic goals. Used sound criteria to set priorities and deadlines. Used quality tools and processes to develop action plans. Identified key information. Kept supervisors and stakeholders informed.	5 Exceptional preparation. Always looked beyond immediate events or problems. Skillfully balanced competing demands. Developed strategies with contingency plans. Assessed all aspects of problems, including underlying issues and impact.	7	NO		
Ability to anticipate, determine goals, identify relevant information, set priorities and deadlines, and create a							

# OER CONCERNS

- ▣ Vague Comments
- ▣ Excessive Abbreviations
- ▣ Community-Specific Acronyms
- ▣ Prohibited Comments: References to Medical/Psych issues, Ethnicity, Religion, Race/Family Status, non-CG employment, Proceedings, etc.
- ▣ Overuse of Gender-Specific Pronouns



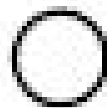
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# Health & Well-Being - 2 mark

Did not adhere to the Coast Guard Fitness Program. Failed to meet minimum standards of weight control or sobriety. Tolerated or condoned others' alcohol abuse. Seldom considered subordinates' health and well-being. Unwilling or unable to recognize and manage stress despite apparent need. Failed to adequately identify and protect personnel from safety hazards.



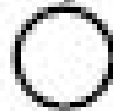
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# Evaluations – 6 mark

No reports submitted late. Narratives were insightful, of the highest quality, and always supported assigned marks. Subordinates' material reflected same high standards. No reports returned for revision. Returned reports to subordinates when appropriate.



Is the Date Submitted block at least 21 days prior?

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# DEROGATORY OERS (M1000.3 5.A.4.h.)

## ▣ Defined As:

- "1" in Any Performance Dimension, or
- "UNSAT" Comparison Scale Mark, OR
- Removal from Primary Duty

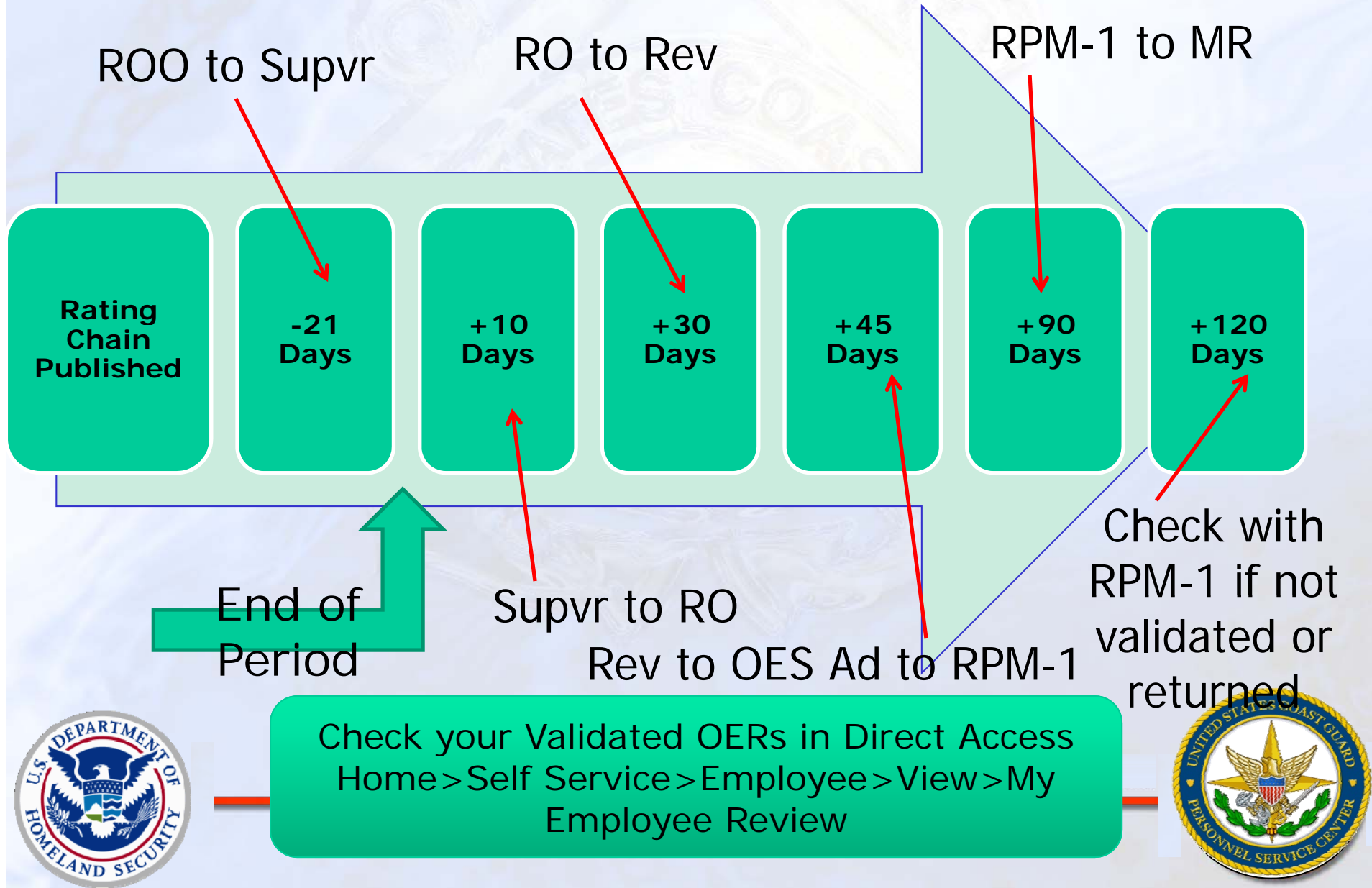


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# The Life of an OER



# OER Corrections Needed

OER Received by RPM-1

OER returned to unit for correction

UP TO 30 DAYS LATER – Unit returns OER to RPM-1



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# Military Records

- Contact PSC-PSD-mr for:
  - If copy of validated OER not sent 30 days after validation (viewable in DA) – current delays ~ 4 months
  - Copies of any documents from EI PDR (Electronically Imaged Personnel Data Record)
  - <http://www.uscg.mil/psd/mr/>
  - .gov & .mil e-mail addresses



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# OER Administrator – your 1<sup>st</sup> line of defense

- Per M1000.3
  - No longer required, BUT recommended that UNITS designate as a collateral duty
- Routine questions – First consult:
  - RPM-1 Website
  - M1000.3 Chapter 5
  - Unit OES Administrator
  - Rating Chain/Local command
  - RFRS Staff
- If still unable to answer, *those* personnel above should contact RPM-1 for guidance



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# Important Tips for Reservists

- Ensure your contact info is current in DA
- Regularly read message traffic ALCGPSC 035/12  
(PY13 preliminary zones)
- Verify point statement ALCGPSC  
007/12
- Communications to the IDPL Boards ?
- ~~Reserve Officer Resumes~~



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# Important Tips for Reservists

- Maintain a Personal OER File
- Update CG-4082
- Achieve Closure - Follow Through
- Don't Delay Submission
- Verify Validated OERs: Direct Access:  
Home > Self Service > Employee > View > My Employee Review
- View EI PDR



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# Q & A

Thank you for your time  
&  
Have a great Coast Guard  
Day!

<http://www.uscg.mil/psc/rpm/rpm1/>

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