



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3000 MARINE CORPS PENTAGON
WASHINGTON, DC 20350-3000

MCO 1800.10
MMSR
01 JUL 2009

MARINE CORPS ORDER 1800.10

From: Commandant of the Marine Corps
To: Distribution List

Subj: MARINE CORPS RETIRED ACTIVITIES OFFICE (RAO)

Ref: (a) SECNAVINST 5420.169J
(b) NAVMC 2925
(c) MCO P1700.24B
(d) 37 U.S.C. 908

Encl: (1) Sample NSPS Position Description
(2) Sample Letter of Appointment Retired Activities Office Volunteer
(3) Sample Retired Activities Office Volunteer Statement of Understanding
(4) Sample Conduct of an Annual Retiree Appreciation Day
(5) Survivor Benefit Plan Counseling Policy

1. Situation. The Deputy Commandant, Manpower and Reserve Affairs (M&RA), through the Retired Activities Section (MMSR-6), is the Marine Corps agency supporting retired Marines, their families and annuitant survivors. MMSR-6 represents the Marine Corps at the Department of the Navy (DON), Department of Defense (DoD) and Congressional levels to implement laws and regulations supporting the retired community. Delivery of services at the installation level has been almost entirely based on a volunteer program as described in the references. On 27 August 2008 the Commandant of the Marine Corps directed professionalization of retired services delivered at the local level, through the creation of National Security Personnel System (NSPS) Retired Activities Office Coordinators (RAOC), to better serve all Marines and their families; active duty, reserve and retired.

2. Mission. Implement and manage Marine Corps Retired Activities Offices at the installation level, per references (a) through (d).

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3. Execution

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. Marine Corps Retired Activities Offices (RAO) and coordinators at the installation level provide direct support to Marines and their families to ensure the relationship between retired Marines and the total force is sustained and remains mutually supportive. The end state maintains the enduring philosophy of, "Once a Marine always a Marine."

(2) Concept of Operations. The Retired Activities Program links the service headquarters role of implementing law and DoD regulations with the personal delivery of services to Marines and their families at the installation level. The program consists of four primary elements:

(a) Secretary of the Navy Retiree Council (SECNAV RC),

(b) Headquarters Marine Corps, Retired Activities Section (MMSR-6),

(c) regional installation commanding generals and installation commanders,

(d) Retired Activities Offices.

b. Tasks

(1) Director, Manpower Management Division (MMSR-6)

(a) Ensure retired Marines, their family members and survivors are provided support and assistance in matters dealing with benefits and entitlements;

(b) serve as the Marine Corps' program manager for administering laws, programs, policies and plans governing retired Marines;

(c) act as the binding link between retired Marines, the Marine Corps and other agencies that provide assistance to retired service members.

(d) Identify fiscal resources through the budgeting and Program Objective Memorandum (POM) process to support installation RAOs.

(e) Provide support to Commanding Generals, Marine Corps Installations (CG, MCI) and installation commanders for program oversight.

(f) Maintain liaison with and provide administrative support to the SECNAV's RC; attend annual meetings with committee members and provide candidates for committee member vacancies for DC, M&RA approval.

(g) Act on behalf of the SecNav as the Marine Corps Survivor Benefit Plan (SBP) program manager.

(h) In accordance with reference (d), submit requests for foreign employment of retired Marines to the State Department for approval.

(i) Interact and coordinate with internal and external agencies such as the DoD, Department of Labor, Social Security Administration, Department of Veteran Affairs (DVA) and other veteran organizations and services regarding retired Marine entitlements and benefits.

(j) Provide standardized RAOC position descriptions for consideration by installation commanders (sample provided as enclosure (1)).

(k) Provide assistance to installation commanders in RAOC hiring and serve as a member of the installation interview and hiring panel.

(l) Evaluate and prioritize RAO training needs in coordination with installation commanders.

(m) Provide technical assistance to the installation commander and RAOC to administer the SBP and Reserve Component Survivor Benefit Plan (RCSBP).

(n) Provide RAO subject matter experts to accompany and assist the Marine Corps Inspector General inspection team.

(o) Sponsor a workshop at least every 24 months to train and certify RAOCs in the SBP.

(p) Provide online current retirement briefs through the Retired Activities Section website.

(q) Sponsor the Navy and Marine Corps Retirement Guide (NAVMC 2642) posted on the Retired Activities Section website.

(r) Assist retired Marines and their families in the determination and application for medical benefits and Defense Enrollment Eligibility Reporting System (DEERS) eligibility.

(s) Publish the "Semper Fidelis, Memorandum for Retired Marines," on a quarterly basis to provide current information to retired Marines, their families and survivors.

(2) The Director, Personal and Family Readiness Division will provide assistance to installation commanders for Marine Corps Community Services (MCCS) program support provided to retired Marines and their families.

(3) Commanding Generals, Marine Corps Installations

(a) Appoint a staff officer to provide guidance and supervision of the regional RAO program.

(b) Develop regional guidance and controls for RAO program implementation and sustainment.

(c) Supervise budget execution of HQMC provided appropriated funds that support the RAO program.

(d) Make recommendations, through installation directed chain of command, for the distribution of paid RAOC positions to DC, M&RA (MMSR-6).

(4) Installation Commanders

(a) Serve Marines, other U.S. service personnel and their families in the geographic area of responsibility in each of the following categories:

1. The survivors of Marines who die on active duty.

2. Active duty Marines and families preparing for retirement.

3. Retiring Reserve Marines and families – those who have completed 20 qualifying years, but have not reached age 60 (also known as “gray area” retirees).

4. All retired Marines and families.

5. Surviving spouses.

6. All DoD retirees and survivors.

(b) Appoint a staff officer to provide guidance and supervision of the RAO program.

(c) Establish and maintain voice mail and e-mail addresses for use by retirees and family members to contact the RAO.

(d) Publicize the installation's RAO to the retired community and solicit volunteer support.

(e) Appoint volunteers to assist the RAOC in the performance of their duties, per enclosures (2) and (3).

(f) Establish local retiree council(s) per reference (a).

(g) Host an annual Retiree Appreciation Day and provide an after-action-report to MMSR-6 within 60 days of completion, utilizing enclosure (4).

(h) Establish and maintain a retirement services webpage within the installation's homepage which includes:

1. A website link to Manpower & Reserve Affairs, Retired Activities Section (MMSR-6).

2. A listing of installation RAO services and upcoming dates such as Retiree Appreciation Day or retiree seminars and luncheons.

3. A quick-reference service directory which lists as a minimum the following agencies and phone numbers, or preferably, an active hyperlink to these organizations:

a. Navy and Marine Corps Relief.

- b. Casualty Assistance.
- c. Commissary.
- d. Military Housing.
- e. ID Card Section.
- f. Legal Assistance.
- g. Medical Facility.
- h. Military Lodging.
- i. MCCS.
- j. Medical Clinic/Pharmacy.
- k. Exchange.
- l. Provost Marshal.
- m. Red Cross.
- n. Education Center.
- o. Traffic Management Office (TMO).
- p. TRICARE.
- q. DVA and local DVA Representative.
- r. Disabled American Veterans and local representative.
- s. Other contacts as deemed appropriate.
- t. Copies of Retiree Council meeting minutes from the previous year.
- u. Retiree Appreciation Day information.
- v. Dates, times and location of future retirement ceremonies.

w. Copies of installation retiree bulletins for the previous year.

x. Other information related to the installation's RAO program.

y. Military One Source.

z. Military Homefront/Plan My Move.

(i) Publish and mail, at least annually, a retiree newsletter suitable for the local retired community and post the newsletter to the installation's homepage.

(j) Consider appointing retirees as members of advisory councils (commissary, clubs, etc.).

(k) Consider hosting seminars, luncheons and town hall meetings on a scheduled basis concerning relevant topics to enhance communication with the local retired community.

(5) Retired Activities Office Coordinators

(a) Administer, coordinate, and provide oversight for RAOs in the area of responsibility.

(b) Represent the installation commander at local retiree councils and other retiree and veteran organizations as directed.

(c) Develop and implement an aggressive volunteer program with continuous recruitment in the local community. Screen RAO volunteers and recommend appropriate candidates for appointment by the installation commander.

(d) Serve as the installation subject matter expert on SBP and counsel Marines and their family members on all aspects of SBP entitlements.

(e) Present pre-retirement briefs and counsel active duty and retired Marines and their families on the retirement process and retirement benefits, to include career status bonus considerations.

01 JUL 2009

(f) Provide the following information using the Defense Finance and Accounting Service (DFAS-CL), Defense Retired and Annuity Pay System (DRAS) to authorized persons:

1. Retired Marine's pay account.
2. Annuitant's pay account.
3. Allotments.
4. Beneficiary information.
5. Mailing address.
6. Bank information.

(g) Assist the Installation Personnel Administration Center (IPAC) in the processing of DD Form 2656 (Data for Payment of Retired Personnel), per enclosure (5).

(h) Plan, publicize, and coordinate the installation's Retiree Appreciation Day, per enclosure (4).

(i) Assist retirees with applications for federal entitlements and benefits, to include Combat-Related Special Compensation (CRSC) and Concurrent Retirement and Disability Pay (CRDP).

(j) Coordinate with the legal assistance office to counsel active and retired Marines and their spouses on the Uniformed Services Former Spouses' Protection Act (USFSPA).

(k) Ensure the protection of personally identifiable information (PII) according to law and regulation.

c. Coordinating Instructions

(1) DC, M&RA (MMSR-6) and CGs MCI will determine the distribution of paid RAOC positions to best support the total force.

(2) Installations will provide a current copy of the RAOC position description to the DC, M&RA (MMSR-6).

(3) Installations will provide a copy of the RAOC NSPS performance plan (DD2906) within 60 days of the start of the annual performance period to DC, M&RA (MMSR-6).

d. Roles, Responsibilities, and Functions

(1) DC, M&RA (MMSR-6) with CGs MCI and Installation Commanders. DC, M&RA (MMSR-6) provides program guidance, training and certification support, reviews individual performance plan objectives, and serves as a member on interview and hiring panels.

(2) CG MCI with Installation Commanders. The regional RAOC reviews individual performance plan objectives and serves as a member on interview and hiring panels at the installations. The regional RAOC provides training, overview, and periodic assist visits in supporting the installation RAOs.

4. Administration and Logistics

a. Budget. HQMC (MMSR-6) sponsors base salary and locality pay for YA-2 (0201) positions, benefits, NMCI computer and printer seat, temporary additional duty (TAD), office supplies, newsletter and mailing expenses. Once established, future funding will be submitted by installations through the POM process.

b. Facilities and Equipment. Installation Commanders provide office space with seating for visitors and appropriate equipment.

c. Records Disposition. The records described within this Order are considered unclassified and cannot be destroyed until an approved records disposition is established for them. MMSR-6 and installation commanders shall maintain these records until notified of an approved records disposition.

5. Command and Signal

a. Command. This Order is applicable to the Marine Corps Total Force.

b. Signal. This Order is effective the date signed.



R. S. COLEMAN
Deputy Commandant for
Manpower and Reserve Affairs

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| NATIONAL SECURITY PERSONNEL SYSTEM (NSPS) POSITION DESCRIPTION | | | | | |
|--|---------------------------------|--|---|---|---|
| POSITION AND HIRING INFORMATION | | | | | |
| 1. POSITION NUMBER | | 2. POSITION TITLE Human Resources Specialist, Military | | | 3. OCCUPATIONAL CODE 0201 |
| 4. ORGANIZATIONAL TITLE | | 5. CAREER GROUP STND | 6. PAY SCHEDULE YA | 7. PAY BAND 2 | 8. TARGET PAY BAND 2 |
| 10. DRUG TEST <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | 11. BUS CODE 8396 | 12. FAIR LABOR STANDARDS ACT <input type="checkbox"/> N <input checked="" type="checkbox"/> E | | | 13. SUPERVISORY STATUS 8 |
| 14. KEY EMERGENCY ESSENTIAL NO | 15. MOBILIZATION INDICATOR A | 16. ENVIRONMENTAL HAZARD DIFFERENTIAL N/A | | 17. CERTIFICATION REQUIRED <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | |
| 18. POSITIVE EDUCATION REQUIREMENTS <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | | 19. LANGUAGE REQUIRED <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | | 20. LANGUAGE IDENTIFIER N/A | |
| 21. FINANCIAL STATEMENTS REQUIRED <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | | 22. POSITION SENSITIVITY Noncritical-Sensitive | | 23. PAY POOL IDENTIFIER | 24. LAUTENBERG/SMITH AMENDMENT <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO |
| 25. DUTIES Retired Activities Office Coordinator. Supervisory Controls: The employee works under the general managerial supervision of the Installation Commander (Colonel - Major General) who sets the overall organizational objectives and distributes resources. Higher Level Reviewer is the G-1 (or T&D), colonel or YC-3. NSPS immediate supervisor is determined by the Installation Commander. The employee, immediate supervisor and Higher Level Reviewer collaboratively develop and prioritize deadlines, projects and work to be accomplished in managing all retiree issues. The employee keeps supervisors informed of potentially controversial matters. Completed work is reviewed for compliance with law, regulations and established procedures in accomplishment of set objectives and deadlines. Organizational Management/Supervision: The HQMC Retired Activities Section Head, YC-2 provides program milestones, routine and monthly guidance. Immediate supervisor reviews work and provides daily supervision. Nature of the incumbent's work puts him in daily contact with active duty E6-O6 throughout the Installation, retired members of all ranks, family members, civilian employees at Defense Finance and Accounting Service (DFAS), TRICARE, Department of Veterans Affairs (DVA), Social Security, Red Cross, and other federal and state agencies and local officials. (Continues on Continuation Sheet) | | | | | |
| 26. POSITION'S ORGANIZATION Headquarters U. S. Marine Corps, M&RA, Manpower Management Div, Separation and Retirement Branch, NMMSR-6 | | | | | |
| 27. POSITION OCCUPIED Competitive Service | | | 28. a. DUTY STATION (City - County - State or Overseas Location) LOCAL | | |
| | | | b. GEOGRAPHICAL LOCATION CODE LOCAL | | |
| 29. CORE COMPETENCIES To lead both civilian and military employees performing many diverse and simultaneous actions. Research, interpret, and apply laws and regulations according to Title 10 & 38, MCO P1741.11C, MCO P1900.16F, AF136-3026, NAVMC 2642 and SECNAVINST 5420.169J. Comprehensive knowledge of Marine Corps retirement process for both Officer & Enlisted. Oral and written communication skills providing authoritative guidance and information to internal and external agencies. Comprehensive knowledge of Retired Activities, retired pay, DEERS, Veterans Benefits, SSA, Medicare, Tricare & Tricare for Life, Retiree Dental Plan, Armed Forces Retirement Home, and local agencies. | | | | | |

NATIONAL SECURITY PERSONNEL SYSTEM (NSPS) POSITION DESCRIPTION

CONTINUATION SHEET

Personnel Management Leadership: (20%)

The Incumbent represents Headquarters Marine Corps and the Installation commander in a variety of formal and informal councils, boards, groups and organizations. The Incumbent may choose or be appointed to various positions in these organizations that are compatible with and do not interfere with the accomplishment of assigned job objectives. The Incumbent is a member of the Installation Transition Assistance Management Program and may be appointed to leadership positions in that capacity that do not interfere with the accomplishment of job objectives. The Incumbent leads and supervises volunteers assisting in the accomplishment of assigned job objectives, counsels and coaches these individuals and ensures adherence to equal employment opportunity policies in the performance of duties.

Technical Expertise and Oversight (80%)

Mission and objectives for Installation Retired Activities Office Program are contained in Marine Corps Order 1720.2 (Marine Corps Retired Activities Office Program). Incumbent will organize, develop, and carry out the program exercising a high degree of initiative and independent judgment. Guidelines cover the program on a broad level and may be modified to fit local application and specific circumstances.

Serve as the Regional or Installation Retired Activities Office Coordinator, as established by MCO 1720.2. As such, maintains awareness of on-going proposed legislation and resulting changes in law relating to the Retired Activities Program, Department of Defense Instructions (DoDI) and Marine Corps policies and plans. Coordinates and ensures the implementation of laws, policies and procedures governing retirement services for retiring Marines, all military retirees, their family members and survivors in the geographic area of responsibility. The Incumbent must also be aware of other agency programs, how these assist the retiree/family member and how to take advantage of these programs. This requires application of numerous program guides. Many situations require the Incumbent to rely on experienced judgment to fill in the gaps in published guidelines.

Assists the Installation commander in establishing and maintaining the Installation Retiree Council. Serves as advisor to the Retiree Council. Coordinates with Retiree Council Chairpersons to schedule and provide administrative support. Ensures council minutes are prepared and distributed. With the chairpersons, periodically meets with Installation commanders to provide updates on retiree issues and receive guidance. Forwards upon request and in the format specified by MMSR-6, any retiree topics, issues and concerns, which the Installation commander and council chairperson(s) determine appropriate for MMSR-6, and the Secretary of the Navy Retiree Council. Plans, coordinates, and conducts the annual Retiree Appreciation Day. When required, drafts letters/memos of appreciation to guest speakers. Develops course curriculum for instruction based on specific needs of targeted participants. Offers presentations convenient to the targeted audience that may require night or weekend scheduling. Develops and implements an aggressive volunteer program with continuous recruitment efforts aboard the installation and the community.

Briefs commanders and staffs on the retired activities program, resource requirements, and changes having significant impact on the program or persons serviced. Coordinates participation with other government agencies, and facilitates periodic community-wide Pre-Retirement and Survivor Benefit Plan (SBP) briefings for all military retirees and their family members. Coordinates with various military offices to provide specialized or technical assistance.

(Continue on addendum page)

| Guidance for Completing National Security Personnel System Position Description DD Form 2918, July 2006 | |
|---|---|
| * Blocks have a finite number of text lines. Where additional text lines are required, National Security Personnel System (NSPS) Position Description Continuation Sheet may be used. | |
| Block # | Guidance |
| #1 - Position Number | Self explanatory. |
| #2 - Position Title | DoD NSPS Prescribed Title (NSPS SC1920.AP4) |
| #3 - Occupational Code | DoD NSPS Prescribed Code (NSPS SC1920.AP4) |
| #4 - Organizational Title | Informal title of position. NSPS PDs may have an organizational title assigned locally. |
| #5 - Career Group | DoD NSPS Prescribed Title (NSPS SC1920.AP1) |
| #6 - Pay Schedule | DoD NSPS Prescribed Code (NSPS SC1920.AP2) |
| #7 - Pay Band | DoD NSPS Prescribed Code (NSPS SC1920.AP5) |
| #8 - Target Pay Band | Self explanatory. |
| #9 - OPM Functional Code | If applicable, assign Functional Designation for Engineers and Scientists (NSPS SC1920, AP 5, Part V) |
| #10 - Drug Test | Self explanatory. |
| #11 - BUS Code | Self explanatory. If 8388 is assigned, PD must include rationale. |
| #12 - FLSA | Self explanatory. If exempt is assigned, citation of 5 CFR 551 exemption criteria must be included. (NSPS SC1920.9) |
| #13 - Supervisory Status | Assign appropriate supervisory status code |
| #14 - Key/Emergency Essential | Indicate if position is Key or Emergency Essential (DoD Directive 1404.10, April 10, 1992) |
| #15 - Mobilization Indicator | Self explanatory. |
| #16 - Environmental Hazard Differential | Self explanatory. (NSPS SC1930.AP5) |
| #17 - Certification Required | Select one. If "YES" identify the certification required. (e.g., DAWIA level) |
| #18 - Postive Education Requirements | Select one. If "YES" identify the educational requirement. (e.g., Bachelor's Degree) |
| #19 - Language Required | Check one. If "YES" complete Block #20. |
| #20 - Language Identifier | Indicate language identifier code and clear text (e.g., FRA = French) |
| #21 - Financial Statement Required | Select one. |
| #22 - Position Sensitivity | Self explanatory. |
| #23 - Pay Pool Indicator | Self explanatory. |
| #24 - Lautenberg/Smith Amendment | Select one. |

| Guidance for Completing DD Form 2918, July 2006 (Continued) | |
|--|--|
| #25 - Codes * | The PD information must be sufficient to classify the position, e.g., career group, pay schedule, pay band, occupation code, title, supervisory status, FLSA status, qualifications. (NSPS SC1920.4.8) Additional information may be added to NSPS Continuation Sheet. |
| #26 - Position's Organization | The organizational location of the position. (e.g., component, installation, department, division, branch, section) |
| #27 - Position Occupied | Enter either: "1 = Competitive Service" "2 = Excepted Service" See 5, §212.101, for information on the competitive service; 5 CFR, §213.101, for the excepted service. |
| #28a - Duty Station | Self explanatory. |
| #28b - Geographic Location Code | Self explanatory. |
| #29 - Core Competencies * | KSAs and behaviors identified as important to the position and used for career and personal development. Additional information may be added to NSPS Continuation Sheet. |
| #30 - Component Information | Component specified |
| #31 - FPP Option Code | Indicate applicable three digit code and clear text |
| #32 - Skills * Information | KSAs developed from job analysis which the employee needs to execute the duties of the position. Also includes credentials, licenses, etc. Additional information may be added to NSPS Continuation Sheet. |
| #33 - Conditions * of Appointment | Unique or special requirements of the position, such as security clearance, travel requirements, driver's license. Additional information may be added to NSPS Continuation Sheet. |
| #34 Other requirements | Self explanatory. |
| #35 - Authorized Management Official | See NSPS SC1920.4.7 |
| #35a - Signature | Self explanatory. |
| #35b - Title | Self explanatory. |
| #35c - Date | Self explanatory. |
| #36 - Classification Approved By | See NSPS SC1920.4.7 |
| #36a - Signature | Self explanatory. |
| #36b - Title | Self explanatory. |
| #36c - Date | Self explanatory. |

Retired Activities Coordinator Position Description - Addendum
Page

Prepares written documents as required. Represents the command at conferences and planning sessions. Serves as the installation subject matter expert (SME) regarding retirement services rendered to Marines, retirees, family members and survivors. Reviews and updates local publications as required.

Use the Defense Manpower Data Center (DMDC) Retiree Address Finder (RAF) to provide authorized officials access to current information regarding retired military personnel, annuitants, and gray area retirees (Reserve Marines in receipt of a 20-year letter not yet in receipt of retired pay). Use the Defense Retired/Annuitant Pay System (DRAS) Annuity Pay System (APS) and Retiree and Casualty Pay Subsystems (RCPS) in order to: monitor retiree pay accounts, review transactions, conduct transaction error resolution, process requests for changes of address, bank accounts, tax changes and reissue of tax forms and retiree account statements.

Administer the Survivor Benefit Plan (SBP) at the installation level. Conduct group briefings and one-on-one counseling with Marines and family members concerning SBP options and entitlements. Assist Marines and family members making the SBP selection in accordance with established law; computing cost of monthly premium; and completing DD Form 2656 (Data For Payment of Retired Personnel). Processes the DD Form 2656 to the Defense Finance and Accounting Service - Cleveland (DFAS-CL). Individually counsel and assist survivors of retired Marines, and Marines who die on active duty regarding their SBP options and entitlements and the proper processing of their SBP elections.

Compile and submit annual funding requirements for the operation of the installation Retirement Activities Program. Keep a thorough account of RAO annual expenditures.

Completed work contributes to the quality of life of Marines, reservists, retirees, and family members who transition from employment with the Marine Corps. The work is primarily sedentary. TAD travel will be required to attend meetings and workshops, coordinate RAO programs, and assist in TAMP. Work is performed in an office setting. Performance is evaluated in terms of overall effectiveness in achieving established goals and quality of service rendered.

**Sample Letter of Appointment
Retired Activities Offices Volunteer**

DATE (_____)

Dear (name of volunteer),

Congratulations on your selection as a volunteer for the Retired Activities Office (RAO) at (installation). As a RAO volunteer, you will play a vital roll in assisting the retired military members and their families of the community surrounding our installation.

As a volunteer, your responsibilities will be many and varied and you can be expected to help in many areas of retiree concerns. These many areas include, but are not limited to:

- Referring military retirees to available services on this installation as well as services available in the local community.
- Providing information regarding benefits to which military retired service members and their families are entitled.
- Assisting military retired service members with solving many problems relating to casualty affairs, medical care, military pay, and other military benefits to which they may be entitled.

All of these activities are important and help ensure the retired military community access to their many and varied benefits. You are assured that the RAOC will assist you in the performance of your associated activities and help ensure you receive the training you need to perform them successfully.

As a volunteer I ask that you read the attached "Statement of Understanding" and, if there are no additional questions please sign and return it to the RAOC that you are working with.

Again, it is my pleasure to welcome you to (installation) RAO Program. I look forward to having you as a member of our team!

Signed _____
(Retired Activities Office Volunteer)

**Sample Retired Activities Office Volunteer
Statement of Understanding**

DATE

I understand that my service as a Retired Activities Offices (RAO) volunteer for (installation) will commence effective (enter effective date). I understand that my service as a RAO volunteer will be performed on a gratuitous basis, i.e., without compensation. Any reimbursement for incidental expenses will be subject to the availability of funds and the installation commander's discretion.

I understand that as a RAO volunteer, I will not be considered to be a Federal employee for any purpose other than the Tort Claims provisions of Chapter 171 of Title 28, U.S. Code, and for the purpose of relating to the compensation for work related injuries provided under Chapter 81 of Title 5, U.S. Code. I also understand that service, as a RAO volunteer, does not entitle me to further employment with a Federal organization or agency.

I understand that, as a RAO volunteer, the personal information provided me on the retirees and their families is, and will be, protected by the provisions of the Privacy Act of 1974. I understand that the personal information I have been provided will be used only in the official execution of those tasks relating to RAO matters.

I understand that as a RAO volunteer, I will hold myself to the highest standards of confidentiality. I understand that issues pertaining to retirees and their families will be discussed only with those individuals directly having a "need to know."

(Signature of RAO Volunteer / Date)

Sample Conduct of an Annual Retiree Appreciation Day

The Retiree Appreciation Day (RAD) keeps retired Marines and families up to date on changes to their retirement rights, benefits, and privileges. The RAD fosters good will between the retired and active duty communities. The RAOC shall seek out various agencies to brief retirees and their families.

- RADs will be conducted at least once annually by major Marine Corps installations. Commanders should determine the best way to support the retired population when conducting a RAD based on resources, population, and availability of services.
- Local advertising and prompt notification to the editor of the "Semper Fidelis Memorandum for Retired Marines" allows optimum publicity.
- RADs may be held in conjunction with other community events or RADs held by other services.
- The RAOC will provide a RAD After Action Report (AAR) to MMSR-6 no later than 60 days after completion of the event. A sample AAR is provided in this enclosure.

Retiree Seminars

As directed, Retiree Seminars with appropriate classes/luncheons provide installation commanders a convenient vehicle to maintain close personal contact and distribute information to retired members and their families. This will help gain insight on local community issues of importance. Commands will notify MMSR-6 of scheduled Retiree Seminars/luncheons.

- Every effort should be made to include Secretary of the Navy Retiree Council members residing in the geographical area for planning, scheduling, and promoting seminars. Additionally, commands are encouraged to invite local public officials to Retiree Seminars. Seminars should be scheduled to promote the greatest possible participation.
- The below contains recommended seminar topics and speakers that should be included whenever possible.

SAMPLE RETIREE APPRECIATION DAY/LUNCHEON AFTER ACTION REPORT

DATE: (Date prepared/submitted)

SUBJECT: After Action Report - (Event Title)

FROM: Installation Commander

TO: Headquarters U.S. Marine Corps, Manpower and Reserve
Affairs (MMSR-6), 3280 Russell Road, Quantico, VA
22134

CC: (Courtesy Copy to interested individuals)

ENCL: (1) Copy of Program/Flyer

1. PURPOSE:

- What was the mission description?
- What were the key tasks involved?
- Define acceptable standards for success.

2. EXECUTIVE SUMMARY:

- What happened? Who participated (agencies/individuals).
- Discuss the topics covered.
- Relevant times and dates.
- State the number of people invited and the number that actually attended.

3. LESSONS LEARNED:

- What can be done better next time?
- Focus on items you can fix and try to suggest solutions to identified problems. If you don't have a solution, try to provide options.
- Identify successes to maintain those strengths.

4. COMMENTS:

- This includes good and bad performance, questionable actions.
- It can also include suggested changes in policy, or anything the submitter wants the chain of command to know about.

5. ACTION ITEMS:

- Develop a list of what actions to take to fix specific needs.
- Timelines and responsibilities.

Survivor Benefit Plan Counseling Policy

The Survivor Benefit Plan is the sole means by which survivors can receive a portion of military retired pay. Participation in SBP allows retired members to voluntarily elect to receive reduced retired pay during their lifetime in order to provide a portion of their retired pay as an annuity to their survivor(s). All Marines, regardless of marital status, must make an SBP election before retirement.

- Only individuals, who successfully complete the RAOC SBP certification course may counsel retiring Marines and spouses on SBP.
- New SBP counselors who have completed the mandatory on-the-job training may be granted a temporary waiver of RAOC certification, until the next scheduled SBP certification class. Any SBP counseling must be supervised by a certified SBP counselor.
- Between the time the retirement application is submitted, but no less than 60 days before retirement, every Marine must be personally counseled on SBP, to include categories available under 10 USC 1448(a) and the effects of such elections in accordance with 10 USC 1455(b)(1).
- At least 30 days prior to the effective retirement date, the Marine must sign the DD Form 2656. The DD Form 2656 must be notarized for any election other than maximum spouse coverage. RAOCs shall become, or have access to, a notary public for the purpose of notarizing this form.
- Whenever possible, SBP counseling of spouses will be conducted in person. If the spouse is unavailable for counseling, based on incapacitation or geographic location, prescribed SBP information will be mailed to the spouse using certified mail, restricted delivery, along with notification of the Marine's SBP election, a cost-benefit estimate, and a request for spouse concurrence with the election, if applicable.

- The following SBP provisions will be discussed during counseling:
 - Any spouse and/or dependent child of a Marine that dies "in the line of duty" while on active duty is automatically enrolled in SBP at no cost to the Marine.
 - Before retirement, the Marine must elect, in writing, one of the following:
 1. Spouse or Former Spouse Only.
 2. Spouse or Former Spouse and Child(ren).
 3. Child(ren) (only).
 4. Natural Person with an Insurable Interest.
 5. No Participation.
 - Spouse concurrence.
 1. Married Marines must have the written, notarized concurrence of their spouse to elect not to participate in the SBP, elect coverage at a reduced amount, or elect child only coverage (10 USC 1448(a)(3)(A)).
- Participation in the SBP at the maximum level of coverage for Marines under final pay or HIGH 3 retired pay plans is defined as the full retired pay base amount.
- Participation in the SBP at the maximum level of coverage for Marines under the REDUX retired pay plan is defined as the full retired pay they would have received under HIGH 3 if they had not elected the CSB.
- All retiring Marines must make an SBP election, even if they are not married, or have no eligible dependent children, at the time of retirement.
 - The Marine's election must be dated on or before their spouse's written concurrence.
 - By law, married Marines who fail to provide written spouse concurrence or obtain an approved waiver before their date of retirement will be enrolled in full spouse SBP coverage, or if any type of child(ren) coverage is elected, full spouse and child(ren) SBP. DFAS-CL will use DD Form 2656-8 (Survivor Benefit Plan (SBP) - Automatic Coverage Fact Sheet) to validate family members to be listed as eligible beneficiaries under SBP for Marines who are enrolled in SBP automatic coverage.

01 JUL 2009

- Married Marines who cannot obtain spouse concurrence because the spouse whereabouts are unknown, or because of exceptional circumstances, may request a waiver of spousal concurrence from MMSR-6.
- Spouse concurrence is not required for a former spouse and child(ren) election; however, the current spouse must be notified of that election.
- The SBP premiums are tax-free and automatically deducted from retired pay, regardless of any decree or property settlement stating otherwise. If there is no retired pay or insufficient retired pay, direct remittance of premiums is required.
- Cost and annuity amounts for each category. The minimum amount of coverage a member can elect is \$300 and the maximum amount is full retired pay.
 - The cost for spouse/former spouse SBP coverage is 6.5% of the base amount elected by the member. The cost for child coverage is based on the age of the member, the spouse and the youngest child. To figure the cost for an insurable interest several things are taken into consideration. For a more detailed explanation of the costs for SBP, please see our website at: <https://www.manpower.usmc.mil> - Veteran Marine - MMSR - Retired Activities - Survivor Benefit Plan.
 - The annuity payment will be 55% of the base amount elected by the member at the time of retirement.
- As of 1 October 2008, SBP premiums will be considered paid-up upon the member's reaching age 70 and having paid SBP premiums for at least 360 months (PL 105-261, Section 641, dated 17 October 1998 and DOD Implementing Guidance-SBP Paid-up Provisions, dated 6 November 2006).
- Certain beneficiary changes are permitted, by law, after retirement. Please see our website at: <https://www.manpower.usmc.mil> - Veteran Marine - MMSR - Retired Activities - Survivor Benefit Plan for allowed changes and requirements.

- Using DD Form 2656-2 (Survivor Benefit Plan (SBP) Termination Request) a retired member can terminate SBP, with spouse concurrence if applicable, between the second and third anniversary of commencement of retired pay (10 USC 1448a). The decision to terminate coverage under this provision is irrevocable. Re-enrollment is denied, even during an open enrollment period. Premiums paid through the date of termination will not be refunded.
- If the Marine is mentally incompetent at retirement, the RAOC will counsel the legal guardian or primary next of kin (PNOK). HQMC, MMSR-6, will make an election on the Marine's behalf.
- Refer Marines and spouses to the legal assistance office when possible legal conflict exists.

Survivor Benefit Plan Election Procedures

The SBP election will be made using the most current version of DD Form 2656, or DD Form 2656-1 if any type of former spouse coverage is elected, no later than 60 days before retirement. SBP elections made under 60 days, may delay commencement of retired pay and/or result in automatic enrollment with maximum coverage.

- If a Marine has been declared mentally incompetent at retirement, HQMC, MMSR-6, as delegated by the Secretary of the Navy, will make the SBP election on behalf of the Marine following in-depth counseling of the Marine's PNOK by the RSO.
- A retired Marine may request correction of a government administrative error made in connection with an SBP election by writing to Head Retired Activities, Separation & Retirement Branch, 3280 Russell Road, Quantico, VA 22134. The request must include a copy of the SBP election, along with other supporting documentation or statements. A retired Marine will contact the installation RAOC or MMSR-6 if there are questions as to what constitutes an administrative error.

Active Duty Death Survivor Benefit Plan Counseling

When feasible the RAOC will work with the Casualty Section, MR Division, and accompany the CACO to ensure survivors of Marines who die on active duty receive SBP counseling.

- The Head Retired Activities, Separation and Retirement Branch, as delegated by the Secretary of the Navy will, following in-depth counseling by the RAOC, adjudicate:
 - Child Only - Spouse excluded SBP elections.

Annuities for Certain Military Surviving Spouses

The Annuities for Certain Military Surviving Spouses (ACMSS) program provides an annuity for the surviving spouse of a retired Marine (regular or reserve) who died before 21 March 1974 and was already drawing retired pay at the time of death; or the surviving spouse of a reserve member with 20 years of qualifying service, not yet in receipt of retired pay, that died before 1 October 1978.

- The surviving spouse must never have remarried.
- The surviving spouse must not be in receipt of Retired Serviceman's Family Protection Plan (RSFPP), or Minimum Income Widow (MIW) annuity.
- ACMSS is reduced by the amount of Dependency and Indemnity Compensation (DIC) received from the VA.

Eligible surviving spouses may request an ACMSS annuity by forwarding a completed DD Form 2769 (Application for Annuity - Certain Surviving Spouses), with supporting documentation, to Head Retired Activities, Separation and Retirement Branch, 3280 Russell Road, Quantico, VA 22134, for approval.