



FLOTILLA ELECTED LEADER ACADEMY



Division 114-07 Channel Islands

Saturday November 23, 2024





Introductions





FELA

Today's Highlights

- **Leader Responsibilities**
- **Administrative Procedures / Policy**
- **Membership Mentoring & HR**
- **Flotilla & Member Evaluation**





Sharing the Vision





A SHARED VISION unites and provides a common goal for groups of people.

A SHARED VISION has an unlimited amount of people power once tapped!





Mission

- To promote and improve recreational boating safety;
- To provide a diverse array of specialized skills, trained crews, and capable facilities to augment the Coast Guard and enhance safety and security of our ports, waterways, and coastal regions; and,
- To support Coast Guard operational, administrative, and logistical requirements.





The Vision

“The U.S. Coast Guard Auxiliary – the best trained, most valued maritime volunteer organization in the world – highly effective during normal operations and ready for emergencies.”

We Do What We Do.. To Save Lives





Core Values

- **Honor** – Integrity is our standard. We demonstrate uncompromising ethical conduct and moral behavior in all of our personal and organizational actions. We are loyal and accountable to the public trust.
- **Respect** – We value our diverse membership. We treat each other and those we serve with fairness, dignity, respect, and compassion. We encourage individual opportunity and growth. We encourage creativity through empowerment. We work as a team.
- **Devotion to Duty** – We are volunteers who seek responsibility, accept accountability, and are committed to the successful achievement of our organizational goals. We exist to serve. We serve with pride.





A Story

Painting the Ship





Now, let's look at the Coast Guard's example of a SHARED VISION



- A BM2 takes a working party of three SNs to paint their CG Cutter. All three SNs have the same paint, brush and instructions to paint their assigned area.
SN#1 paints bow; SN#2 mid ships; SN#3 stern





the Coast Guard's example of a SHARED VISION



Two hours later, the BM2 comes back to inspect the work. He asks each SN the same question:





the Coast Guard's example of a **SHARED VISION**



“SN#1-- What are you doing?”

SN#1 says: “I’m painting the bow BM2!”





the Coast Guard's example of a **SHARED VISION**



“SN#2-- What are you doing?”

SN#2 says: “I’m Saving the Cutter BM2!”





the Coast Guard's example of a **SHARED VISION**



“SN#3-- What are you doing?”

SN#3 says: “I’m Saving LIVES BM2!”





the Coast Guard's example of a SHARED VISION



Three different answers for the same job?

Why is that?





the Coast Guard's example of a **SHARED VISION**



The differences are the attitude and understanding of the role each SN plays in one of the main missions of the Coast Guard

SAVING LIVES!





the Coast Guard's example of a SHARED VISION



The SHARED VISION of keeping the Cutter ready and seaworthy to Save Lives was totally understood by SN#3.

He knew his painting was “Saving Lives”.





the Coast Guard's example of a SHARED VISION



SN#2 had an understanding that the
Cutter had to be seaworthy.

He KNEW his painting was “saving the
Cutter”.





the Coast Guard's example of a **SHARED VISION**



SN#1 only understood it was
supposed to be painted

“white”





the Coast Guard's example of a SHARED VISION

This may work for a Cutter's working party

BUT, how does this apply in

The Auxiliary?





The Auxiliary should have all members understand what they do contributes to “Saving Lives”

Let's look at our three SNs as three Auxiliarists; all three pay their dues and get uniforms and are excited about joining --- then this happens...

- Member #1 does not show up for anything
- Member #2 only goes to Flotilla meetings
- Member 3 gets certified, holds office, goes to meetings, and attends this workshop



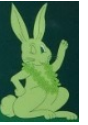


We Do What We Do To Save Lives

- **It is your job as Flotilla leaders to have your members understand that any job they do “Saves Lives”.**
- We all joined the Auxiliary for some reason. All of you in this room stayed true to why you joined.
- However, some Aux members have lost touch with their reason(s) due to circumstances and not understanding what their time and efforts can do to:



SAVE LIVES



A SHARED VISION is very important to the Coast Guard and Auxiliary

We Do What We Do To Save Lives!

BUT, something must be done first...





Communicate!

- **Say it!**
- **Write it!**
- **Talk about it!**
- **Believe it!**

WE DO WHAT WE DO TO SAVE LIVES





Leadership Responsibilities





Leader Qualities

DEFINITION

***“YOU ...influencing others
to achieve a common
goal”***





Leader Qualities

- *Communicator*
- *Confidence*
- *Listener*
- *Open minded*
- *Consistent*
- *Flexible*
- *Respectful*
- *Visionary*
- *Organized*
- *Delegator*
- *Honest*
- *Decision maker*
- *Patience*
- *Handle criticism*
- *Motivator*
- *Resourceful*





Leader Competencies





Leader Competencies

- Leadership competencies are the knowledge, skills, and expertise the Coast Guard and Auxiliary expect of their leaders. While there is some overlap in these competencies, they generally fall within four broad categories: Leading self, Leading others, Leading performance and change, and Leading the Coast Guard Auxiliary.





Leader Competencies

Together, these four leadership categories and their elements are instrumental to career success. Developing them in all members of the Coast Guard team will result in the continuous improvement necessary for us to remain Semper Paratus.





Leader Qualities

Remember.....

You are a LEADER in your elected office.

You are responsible to others, and

Others are responsible to you.

DWYSYWD





Leadership Succession

Essentially, succession planning is a conscious decision by leadership to foster and promote the continual development of members, to ensure that elected and appointed positions maintain some measure of stability, thus enabling the member, flotilla, division, or district to achieve mission objectives.





Leadership Succession

By planning for the annual election or appointment transitions **well in advance** the Auxiliary can maximize the potential of its members, flotilla, division, or district and enable it to meet future mission needs.





Leadership Succession

Chain of Leadership

- The purpose of the USCG Auxiliary is to support the U. S. Coast Guard in its missions.
- It is widely accepted that the Flotilla Commander (FC) is the **KEY** to the success of the Flotilla.
- **EVERY person/position** (above FC) in the USCG Auxiliary is there to support, assist, and guide the Flotilla Commander to complete his/her missions.





USCG

NATIONAL

DISTRICT

DIVISION

FLOTILLA

THE CGAUX PYRAMID IS SUPPORTED ENTIRELY BY THE FLOTILLAS.

ALL OTHER POSITIONS ABOVE THE FLOTILLA EXIST TO GUIDE & SUPPORT THE FLOTILLAS. IF THE FLOTILLAS FAIL, SO DOES THE ENTIRE ORGANIZATION!



Leadership Succession

Document Review:

AUXILIARY SUCCESSION PLANNING GUIDE





Flotilla Goals

Have a discussion to construct Flotilla Goals for 2025

- **RBS:** How Many **Public Affairs** events
- **RBS:** How Many **Program Visitations & Vessel Exams**
- **RBS:** How Many **Public Education** Classes
- **Recruiting** New Members (How? Message?)
- **Member Training** Topics each month
- **Fellowship** Events for the year
- Publish Flotilla **Calendar** for the year (update regularly)





Flotilla Commander Responsibilities





Leadership Responsibilities

Document Review:

Flotilla-Procedures-Guide





FC Responsibilities

The FC is responsible for every aspect of the flotilla and its activities. The leader must respond to changing policies, needs, and opportunities .





FC & VFC Responsibilities

The months of November and December before actually assuming office are the most important of the new FC's term of office.

There is no time to lose in assembling the leadership team for the coming year and laying down a track line for the months ahead.





FC & VFC Responsibilities

The FC leads and manages the flotilla in the performance of its administrative, supervisory, and functional activities.

The Flotilla Vice Commander (VFC) serves as chief of staff, coordinating staff actions, reviewing staff reports, advising on matters pertaining to staff functions, and providing a preliminary point of contact for flotilla members' questions and concerns.





VFC

Responsibilities

The VFC assists the FC in leading and managing the flotilla. A good VFC lightens the senior officer's load in many ways, and contributes to the flotilla's success. In addition to the specific duties listed below, the VFC should act as another set of eyes and ears, alert for both things that are going well and those that are not going so well, keeping the FC better informed on the pulse of the organization.





FC Responsibilities Top 10

- 1. Review, support, and implement national, district, and division Auxiliary missions and visions**
- 2. Ensure support and compliance with Auxiliary and Coast Guard policies.**
- 3. Lead, manage, and supervise the operation of the flotilla, including member training, qualification, assignment to duty, recognition, and corrective action.**





FC Responsibilities Top 10

- 4. Encourage fellowship activities**
- 5. Be alert for praiseworthy performance**
- 6. Recruit and retain membership**
- 7. Appoint the flotilla staff officers**
- 8. Encourage accurate and timely input of mission hours into AUXDATA II**
- 9. Promptly submit required reports and correspondence**
- 10. Adhere to all provisions of unit standing rules.**





VFC Responsibilities Top 5

- 1. Serve as the flotilla's chief of staff by supervising flotilla staff officer activities**
- 2. Review and act on reports submitted by flotilla staff officers**
- 3. Assist in the training and orientation of newly appointed staff officers. Be familiar with the duties of each staff officer**





VFC Responsibilities Top 5

- 4. Attend meetings of the division board, and vote in the FC's absence**
- 5. Provide a preliminary point of contact in the COLM for flotilla members' questions and concerns.**





Division Responsibilities

- FC is a **Voting Member of the Division Board**. FC Must attend Division Monthly Meeting (2nd Monday) VFC always welcome.
- Monthly FC Reports to Division should show your accomplishments/ highlights (due **5th of each month**)
- FSO's are expected to submit monthly reports to SO due by **5th of the Month**.





Division Board (7)

Patrick Newburn
Division Commander

Immediate Past
Division
Commander
Robert Hamming

Paul Labella
Vice Division Commander

Flotilla 7-61

Flotilla 72

Flotilla 73

Flotilla 77

David Hensinger
Flotilla Commander

Joe Schuetz
Flotilla Commander

Shayna Ledesma
Flotilla Commander

Christopher Gilbert
Flotilla Commander



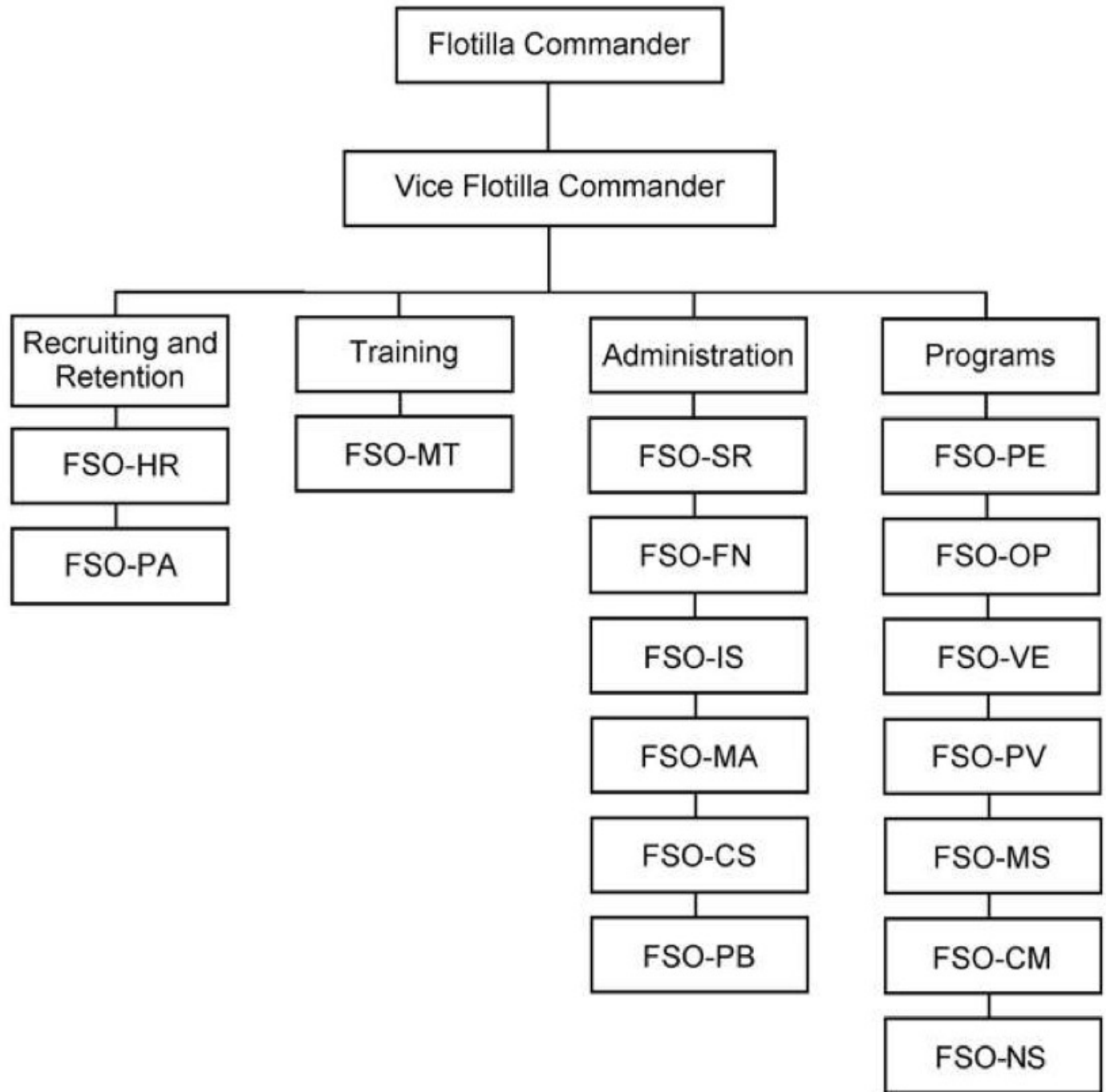
**10 Min.
BREAK**





Flotilla Organization







Appointing Staff

- The FC should appoint appropriate staff to conduct the business of the flotilla including finance, record keeping, information services, and other administrative areas; to manage recruiting/retention and training; and to conduct programs as desired.
- Consult closely with the VFC when making your selections. Remember, the VFC will be acting as chief of staff and working closely with those selected.





Appointing Staff

After appointing the flotilla staff, meet with them with the VFC present. Let FSOs know how you plan to operate and what you expect of them. It is especially important that FSOs understand to whom they must report.

The VFC exercises direct staff supervision, and FSOs must understand that the FC will fully support the VFC.





Appointing Staff

Even though the VFC manages the flotilla staff, the FC, by virtue of position, still bears responsibility for flotilla programs.

Process

- Meet or Phone to Offer & discuss the Job
- Mail 2 documents to the FSO:
 - (1) General Duties of Flotilla Staff Officers
 - (2) Specific Duties of Officer's Function





Appointing Staff

Do not simply hand FSOs their job descriptions and expect them to make it happen!

Explain the job

Explain the goals, discuss expectations

Explain the paperwork

Help them get the training needed





Critical Appointments

- **Sample staff appointment letters and duties are in the Flotilla Procedures Manual**
- **Each Flotilla must have the following appointed staff: SR, FN, MA, MT, HR, IS**
- **Each Flotilla must also have at least one of the following operational staff: PV, OP, PE or VE**





Critical Appointments (Top 5)

FSO-FN (Finance)

FSO-HR (Human Resources)

FSO-IS (Information Services)

FSO-MT (Member Training)

FSO-SR (Secretary/Records)





RBS Appointments

“Job Number One”

- **FSO-PE (Public Education)**
- **FSO-VE (Vessel Examination)**
- **FSO-PV (Program Visitor)**

...There are other **Program Area Appointments** that will help get the work done... Your Flotilla goals will guide these appointments





Change of Administration





Change of Administration





Before End of Year

Document Review:

Change of Administration





Before End of Year

- Transfer of Records and Documents (December 15)
- Complete Staff Appointments and prepare & send **Form 7007: Annual Unit Officers Report** (December 20)
- Any new or Change of Officers must be reported **Form 7006: Change of Officer Report**
- Staff Officer Appointment letters sent by January 1





Before End of Year

- Before 1 January have a meeting with your VFC to coordinate your administrative expectations
- Before the first Flotilla meeting review “Roberts Rules of Order”, in the Flotilla Procedures Manual
- Prepare an AGENDA for each Flotilla meeting. Send-out one week prior to meeting





Auxiliary Structure





Auxiliary COLM

Chain of Leadership
& Management
(COLM)



United States Coast Guard
Director of the Auxiliary



U.S. Coast Guard Auxiliary
National Commodore
NACO



U.S. Coast Guard Auxiliary
District Commodore
DCO

U.S. Coast Guard Auxiliary
District Captain
DCAPT



U.S. Coast Guard Auxiliary
Division Commander
DCDR



U.S. Coast Guard Auxiliary
Flotilla Commander
FC



U.S. Coast Guard Auxiliary
Auxiliarist





District 11sr



- District 11SR has 47 flotillas organized into 9 divisions
- Southern California, Arizona, Southern Utah
- Same District Overlay as US Coast Guard
- Over 1000 Auxiliarists



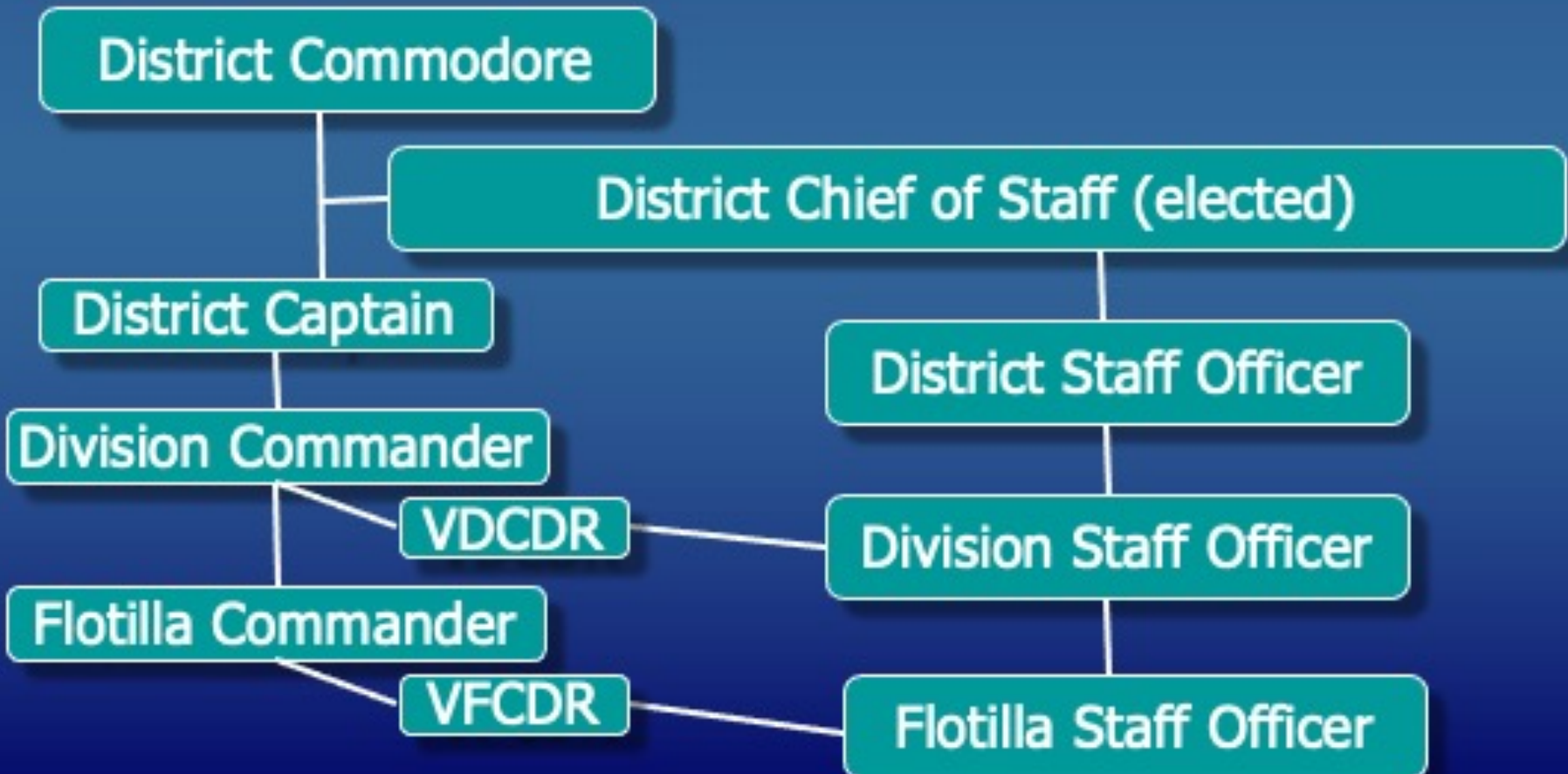


District COLM

Chain of Leadership

■ ELECTED

APPOINTED





Auxiliary Finances





Finances SOP

Document Review:

Auxiliary Financial and Materials Control SOP (April 2024)





Finances

FINANCE REPORT 7025 – Due January 25

- The Financial Report of an Auxiliary Unit ANSC 7025 (CGAUX-23) must be sent to the DCDR by 25 Jan.
- This report is the responsibility of the outgoing FC.
- Must be signed by the outgoing and incoming FSO-FN.
- The Unit Inventory must be signed by the outgoing and incoming FSO-MA.
- Both must be signed by the outgoing and incoming FCs confirming report is complete and accurate





Finance Report - 7025

DEPARTMENT OF TRANSPORTATION U.S. COAST GUARD ANSC 7025 (11-97)	UNITED STATES COAST GUARD AUXILIARY FINANCIAL REPORT OF AN AUXILIARY UNIT
REPORTING UNIT (NAME & NUMBER)	TYPE OF REPORT - CHECK ONE <input type="checkbox"/> REGULAR <input type="checkbox"/> RELIEF <input type="checkbox"/> CORRECTED
	TYPE OF UNIT - CHECK ONE <input type="checkbox"/> DISTRICT <input type="checkbox"/> DIV <input type="checkbox"/> FLOTILLA
Do not enter real estate, equipment, inventory, or other property on this page. See reverse side.	
1. BEGINNING BALANCE 1/1/ _____	
a. Checking account b. Savings, CDs c. Trust Funds d. Other cash items	\$ _____ \$ _____ \$ _____ \$ _____
2. Total Beginning Cash Items	\$ _____ 0.00
3. CASH RECEIPTS	
a. Dues b. PE course fees c. Cash contributions d. Uniform, flags, insignia e. Conferences, mtgs f. Other cash items, specify	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____
4. Total Cash Receipts	\$ _____ 0.00
5. Total Cash Items & Receipts	\$ _____ 0.00
6. CASH DISBURSEMENTS	
a. Dues (Dist/Div) b. PE expenses c. Uniforms, flags, insignia d. Conferences, mtgs e. Material & equipment f. Building repair/maint g. Utilities h. Trophies, awards i. General disb. (specify)	\$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____ \$ _____
7. Total Cash Disbursements	\$ _____ 0.00
8. ENDING BALANCE 12/31/ _____	
a. Checking account b. Savings, CDs c. Trust Funds d. Other cash items	\$ _____ \$ _____ \$ _____ \$ _____
9. Total Cash Items at Year End	\$ _____ 0.00
I, the undersigned certify the above to be true and correct to the best of my knowledge and belief, and I accept responsibility for the same	
FN _____ PREPARER	FC/DCP/DCO _____ APPROVAL
FN _____ RELIEVING OFFICER	DCO/DCP/FC _____ RELIEVING OFFICER
_____ AUDIT COMM IF REQUIRED	_____ DIRECTOR

Previous editions are obsolete

Back of ANSC 7025 (11-97)

UNIT INVENTORY RECORD

A. List date and description of real estate, equipment, inventory, Stocks and bonds, and other property purchased by the unit.

Description:	Date
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Attach additional sheet if necessary.

B. List date and description of Real estate, equipment, inventory, Stocks and bonds, and other property donated or contributed to the unit.

Description:	Date
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Attach additional sheet if necessary.

C. List name of lender and description of equipment and other property on loan to you from the Coast Guard or other Government entities.

Description:	Date
1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Attach additional sheets if necessary

I certify that the above listed property has been verified by me and is true and correct to the best of my knowledge. I, the relieving Officer accept responsibility for the Unit inventory as stated above.

FC/DCP/DCO _____ DATE _____	FC/DCP/DCO _____ DATE _____
MA _____ DATE _____	MA _____ DATE _____
Audit Comm _____ DATE _____	DIRAUX _____ DATE _____

Due March 1, or according to District Policy. Distribution DIRAUX via DSO-FN



SOP Highlights

- The Coast Guard Auxiliary is recognized by the Internal Revenue Service (IRS) as a **government entity**. It has never been a not-for-profit entity or any other type of charitable organization.
- Budget shall coincide with the conventional calendar year, January 1 thru December 31
- Establish the unit's annual budget in advance of the new fiscal year. however it must be approved within the first three months of the fiscal year





SOP Highlights

- Flotilla monthly bank statements shall be reviewed by the Flotilla Commander (FC) and the FSO-FN to verify that all transactions are in order.
- FC and FSO- FN shall be designated as joint signatories for all of the unit's bank accounts
- Special attention shall be made to ensure funds collected from PE course fees are tracked separately
- PE revenue may not be used for social or fellowship activities.





SOP Highlights

- FSO-FN shall prepare a financial report at each monthly unit meeting
- Conduct an annual audit and complete Form 7025
- Appoint Audit Committee (3); review specific composition requirements listed in Financial SOPs





Flotilla Meetings





Flotilla Meetings





Flotilla Meetings

Document Review:

Flotilla Procedures Guide





Flotilla Meetings

- FC must obtain an **Assignment to Duty** (ATD) as approved from DIRAUX. Use D11s website for online form, 14 days prior to unit event.
- There are consequences for non-completion of **CORE Training**. REYR = Unable to attend **in-person** meetings or activities ...**No ATD!** (All members must complete every 5 years).





Flotilla Meetings

- FC must Attend and preside over flotilla meetings, and notify the VFC as early as possible when unable to attend.
- Use Roberts Rules of Order for motions, voting
- Follow the Agenda!
- Usual meetings last 90 minutes
- Monthly Meeting need an **Agenda** sent to member at lease one week prior.





Flotilla Meetings Content

- **Value, respect, and celebrate every member's accomplishments and contributions.** Each flotilla meeting should include several instances of informal recognition to individual members.
- Remember to have fun. **Include fellowship opportunities in every activity**
- Most flotilla meetings **include oral reports** from the staff. Keep reports informative and useful.
- Present and **approve minutes** of prior meeting
- Present approve monthly **finance report**





Flotilla Meetings Content

Include Member Training at every meeting. -

- 30 minutes -

- 30 minutes of training is the minimum to define a meeting as a “training” meeting.
- **Training meetings** are covered by USCG insurance during the meeting.
- *Why Training?* Insurance coverage, interest to members, better trained and informed membership.





Flotilla Meetings Content

Include Member Training at every meeting.

Training Topics Ideas:

- Invite guest speaker and special guests
 - Bomb Squad
 - Red Cross – Disaster Preparedness
 - LAKE/RIVER/HARBOR Law Enforcement
 - Marine Safety, Environmental awareness
 - NOAA – NATIONAL WEATHER SERVICE
- Instructor/ PE training
- Program Visitor (PV) Training
- Vessel Examiner (VE) Training





Information Services & Reporting



INFORMATION SERVICES



- SO-IS a primary information resource for you.
- If your flotilla has no FSO-IS, Division SO-IS can adopt that role.
- SO-IS can help train your members on AUXDATA II.
- For those untrainable members, SO-IS will accept hours in any form, but they must provide Code, Mission Date, Hours, and Description.
- Report hours promptly. SO-IS will not approve hours over three months old (90 days).
- Mission hours, other than 99 code hours, should be reported for the day of the mission.
- Accumulate your 99 code hours each month, and report them using the first of the month.





Typical Reports

- FSO-IS should constantly remind members to log End of Month hours promptly
- **Member Roster** – name, member #, email, phones
- **AUXCT Matrix** – Green, Yellow, Red
- **Uniform Inspections** – date of last inspection
- **Division 7 Flotilla Mission Detail**
 - By member, mission, hours, # PVs, # VEs





Member Roster



Report: Members & Units

Flotilla Member Roster

[Enable Field Editing](#)



[Add Chart](#)



[Edit](#)

This report shows the current flotilla members for the selected unit with their email and phone numbers. This is equivalent to the Members List report in Aux...

Total Records
25

	Unit Number	Member ID	Member Status	Member Status Date	First Name	Middle Name	Last Name	Email	Home Ph
1	1140707	5003686	AX	7/27/2023	JAMES	JOSEPH	AMACHER	van8tive@yahoo.com	-
2	1140707	1221985	BQ	5/23/2006	MIKE	A	ARMIJO	animacreek59@gmail.com	80584
3	1140707	1234939	AX	6/2/2014	BOBBY	L	BRANAM	cgauxbranam@gmail.com	50972
4	1140707	1213306	AX	5/10/2011	MICHAEL	J	BRODEY	mike.brodey@gmail.com	81834
5	1140707	1221028	AX	12/16/2013	NORMAN	M	BUNDEK	normbundekcgaux@gmail.com	-
6	1140707	1244747	BQ	2/7/2013	RYAN	C	BURGESS	rburgess@hasc.org	80552
7	1140707	3010528	AX	3/3/2021	PAUL	WILLIAM	CLARK	msn73312@msn.com	-
8	1140707	5004342	BQ	4/1/2024	CARL	VINCENT	CLEAVENGER	dingmasters@sbcglobal.net	-
9	1140707	5007387	AP	4/27/2024	KEITH	MARTIN	CONDON	condonuscgaux@gmail.com	-
10	1140707	1227034	AX	11/25/2013	RUDY	R	CORTEZ	rudy.cortez77@yahoo.com	80548
11	1140707	1211083	BQ	9/2/2003	RICHARD	C	DUNCAN	rich.c.duncan@gmail.com	47996
12	1140707	1246993	BQ	5/20/2014	RAYMOND	L	FELTS	rfelts82@gmail.com	-
13	1140707	1247558	BQ	5/20/2014	MARK	SANDY	FRAZIER	mark.frazier13@gmail.com	-
14	1140707	3005546	BQ	1/18/2018	CHRISTOPHER	JAMES	GILBERT	cjgilbert14@gmail.com	-
15	1140707	1243591	BQ	2/6/2013	DEBBIE	L	GUEDEA	gdaycherio@hotmail.com	-
16	1140707	5004626	BQ	6/27/2023	Thomas	Patrick	Higgins	higgo257@gmail.com	-
17	1140707	5004435	BQ	4/26/2023	CYNTHIA	CLAIRE	KERBY	ckerby10@gmail.com	-

Filters

Show Me
All units

Created Date
All Time

Unit Number
equals 1140707

Member Status
equals AP, IQ, BQ,
AX





AUXCT Matrix



Report: Competency Task > Competency > Member

AUXCT, Matrix

Red Yellow Green CORE matrix

Enable Field Editing



Add Chart



Edit



Unit Number	Last/First Name	Maintenance Cycle →	Task Short Name →	Annual						One Time
				CRA_502319	PAWR_810015	POSH_810000	SAPRR_502379	SETA_810030	SP_100643	ET_502306
<input type="checkbox"/> 1140707	AMACHER, JAMES		Sum of Matrix Days Until Due	1,138	1,138	1,138	1,138	1,138	0	9,999
	ARMJO, MIKE		Sum of Matrix Days Until Due	-1,784	-1,784	-1,784	-1,418	-1,418	0	9,999
	BRANAM, BOBBY		Sum of Matrix Days Until Due	408	408	408	408	408	0	9,999
	BRODEY, MICHAEL		Sum of Matrix Days Until Due	408	1,138	408	1,869	408	1,869	9,999
	BUNDEK, NORMAN		Sum of Matrix Days Until Due	1,869	1,504	408	1,504	1,504	0	9,999
	BURGESS, RYAN		Sum of Matrix Days Until Due	1,869	1,869	1,869	1,869	1,869	0	9,999
	CLARK, PAUL		Sum of Matrix Days Until Due	408	408	408	408	408	0	9,999
	CLEAVENGER, CARL		Sum of Matrix Days Until Due	1,504	1,504	1,504	1,504	1,504	0	9,999
	CONDON, KEITH		Sum of Matrix Days Until Due	0	0	0	0	0	0	0
	CORTEZ, RUDY		Sum of Matrix Days Until Due	43	43	408	43	43	0	9,999
	DUNCAN, RICHARD		Sum of Matrix Days Until Due	773	773	773	773	773	0	9,999
	FELTS, RAYMOND		Sum of Matrix Days Until Due	408	408	408	773	773	0	9,999
	FRAZIER, MARK		Sum of Matrix Days Until Due	408	408	408	408	408	0	9,999
	GILBERT, CHRISTOPHER		Sum of Matrix Days Until Due	1,138	1,138	1,138	1,138	1,138	0	9,999
	GUEDEA, DEBBIE		Sum of Matrix Days Until Due	-1,418	-1,418	-1,418	-1,784	-1,418	0	9,999
	Higgins, Thomas		Sum of Matrix Days Until Due	1,504	1,504	1,504	1,504	1,504	0	9,999
	KERBY, CYNTHIA		Sum of Matrix Days Until Due	1,504	1,504	1,504	1,504	1,504	0	9,999
	LONGO, RAFAEL		Sum of Matrix Days Until Due	1,869	1,869	1,869	1,869	1,869	1,869	9,999
	Lydecker, Ross		Sum of Matrix Days Until Due	0	0	0	0	0	0	0



Row Counts
 Detail Rows
 Subtotals
 Grand Total
 Stacked Summaries



Uniform Inspection



Report: Members & Units

Copy of Uniform Inspections

Uniform inspection status for 1140707

[Enable Field Editing](#)



[Add Chart](#)



[Edit](#)



Total Records

25

	Member Name/ID ↑	Last Name	Member Status	Uniform Exempt	Uniform Last Inspected
1	AMACHER. JAMES 5003686	AMACHER	AX	<input type="checkbox"/>	6/18/2024
2	ARMIJO. MIKE 1221985	ARMIJO	BQ	<input type="checkbox"/>	-
3	BRANAM. BOBBY 1234939	BRANAM	AX	<input type="checkbox"/>	6/18/2024
4	BRODEY. MICHAEL 1213306	BRODEY	AX	<input type="checkbox"/>	3/10/2024
5	BUNDEK. NORMAN 1221028	BUNDEK	AX	<input type="checkbox"/>	3/10/2024
6	BURGESS. RYAN 1244747	BURGESS	BQ	<input type="checkbox"/>	3/18/2024
7	CLARK. PAUL 3010528	CLARK	AX	<input type="checkbox"/>	3/18/2024
8	CLEAVENGER. CARL 5004342	CLEAVENGER	BQ	<input type="checkbox"/>	6/18/2024
9	CONDON. KEITH 5007387	CONDON	AP	<input type="checkbox"/>	6/18/2024
10	CORTEZ. RUDY 1227034	CORTEZ	AX	<input type="checkbox"/>	5/17/2024
11	DUNCAN. RICHARD 1211083	DUNCAN	BQ	<input type="checkbox"/>	-
12	FELTS. RAYMOND 1246993	FELTS	BQ	<input type="checkbox"/>	-
13	FRAZIER. MARK 1247558	FRAZIER	BQ	<input type="checkbox"/>	6/18/2024
14	GILBERT. CHRISTOPHER 3005546	GILBERT	BQ	<input type="checkbox"/>	3/18/2024
15	GUEDEA. DEBBIE 1243591	GUEDEA	BQ	<input type="checkbox"/>	-
16	HIGGINS. THOMAS 5004626	Higgins	BQ	<input type="checkbox"/>	6/18/2024
17	KERBY. CYNTHIA 5004435	KERBY	BQ	<input type="checkbox"/>	3/18/2024
18	LONGO. RAFAEL 3009224	LONGO	BQ	<input type="checkbox"/>	6/18/2024





Mission Detail



Report: Members with Member Activities and Activity Log

Flotilla Mission Detail - CY

This report shows the mission activity for a specific flotilla in the specified time frame.

Enable Field Editing



Add Chart



Edit



Total Activity Duration Total Program Visits Total VSC Exams Given
5,036.55 **47** **178**

Mission Code	Last Name →	AMACHER	BRANAM	BRODEY	BUNDEK	BURGESS	CLARK	CLEAVENGER	CORTEZ	FRAZIER	GILBERT	Higgins	KERBY	LONGO	M
	First Name →	JAMES	BOBBY	MICHAEL	NORMAN	RYAN	PAUL	CARL	RUDY	MARK	CHRISTOPHER	Thomas	CYNTHIA	RAFAEL	A
<input type="checkbox"/> 01B: TRAILERING	Sum of Activity Duration	0.00	0.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 01D: NON SAR STANDBY	Sum of Activity Duration	0.00	3.00	0.00	0.00	24.00	59.50	0.00	0.00	3.00	19.65	1.00	70.50	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 02: REGATTA SAFETY ZONE SPRT	Sum of Activity Duration	0.00	7.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 03: NAV SYSTEMS PATROL	Sum of Activity Duration	0.00	0.00	0.00	0.00	4.00	3.00	0.00	0.00	4.50	3.00	3.50	6.00	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 06A: OPERATIONAL TRAINING	Sum of Activity Duration	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 06B: OTHER, MEMBER TRAINING	Sum of Activity Duration	0.00	0.00	2.50	0.00	0.00	12.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 07D: CG OPS SUPPORT	Sum of Activity Duration	0.00	0.00	249.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<input type="checkbox"/> 10J: COMREL	Sum of Activity Duration	0.00	0.00	4.00	2.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00	0.00	3.00	0.00
	Sum of Program Visits	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	Sum of VSC Exams Given	0	0	0	0	0	0	0	0	0	0	0	0	0	0

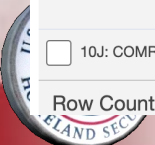
Row Counts

Detail Rows

Subtotals

Grand Total

Stacked Summaries





AUXILIARY UNIT COORDINATOR (AUC)





AUXILIARY UNIT COORDINATOR (AUC)

- All contacts with the CG should go through the appropriate AUC.
- We are always on the lookout for members with skills that can help the stations – radio watch standers, painters, carpenters, ???
- Radio Watch Standers are always in demand but must be prepared to devote considerable time to train at the station, and to stand regular watches.
- AUC maintains the calendar for use of the ATD (Aux Training Deck).





AUXILIARY UNIT COORDINATOR (AUC)

Michael Brodey



CG Station
Channel
Islands



CG Air Station
Ventura



CG Cutter
Blacktip



David Naumann



CG Station
Morro Bay



Thomas Shaw



Marine Safety
Detachment
Santa Barbara



Jonathan Lipsitz



CG Cutter
Blackfin



**Auxiliary Unit
Coordinator
(AUC)**

(Appointed by District
Commodore)
to facilitate the timely
provision of high-quality
administrative and
operational support by the
Auxiliary to the associated
Coast Guard unit.





LUNCH BREAK





Member Communications





Effective Communication

Effective communication occurs when the sender transmits completely, and the receiver interprets exactly as the sender intended.





Communication

Success depends on our ability to understand each other, respect each other, and form an effective organization that rewards everyone's efforts.

The successful leader uses **human relations skills** to work effectively and develop a cooperative spirit among members.





Effective Communication

- **Writes** succinctly and produces written materials that are clear and articulate.
- **Speaks** in concise, effective, organized manner; tailored to the audience and situation.
- **Listens** attentively, understands and absorbs the message of others.
- **Observes** body language and other forms of non-verbal communication.
- Communicates to members and transmits member concerns/ideas to elected and appointed leaders.





Effective Communication

- Identify and Avoid the Barriers to Effective Communication.
- Send Clear, Understandable Messages.
- Listen Actively to Others. Solicit Meaningful Feedback.
- Adapt to Style, Gender, and Cultural Diversity.
- Give Appropriate Feedback.

ALWAYS BE RESPECTFUL





Communication

WRITTEN

- Promptly read, endorse/sign, and forward mail, as appropriate.
- Review your calendar and send reports in a timely manner.
- Plan in advance for monthly/yearly events and let members know dates early.
- **Proof Read your emails before sending!**
- Proof Raed you emails before sending!
- Proof Read you emales before sending!





Communication

- Develop routine communications with VC & VFC.
- Encourage Staff communications to the members, to other Staff Officers, and to Division Officers.
- Follow the Chain of Leadership.



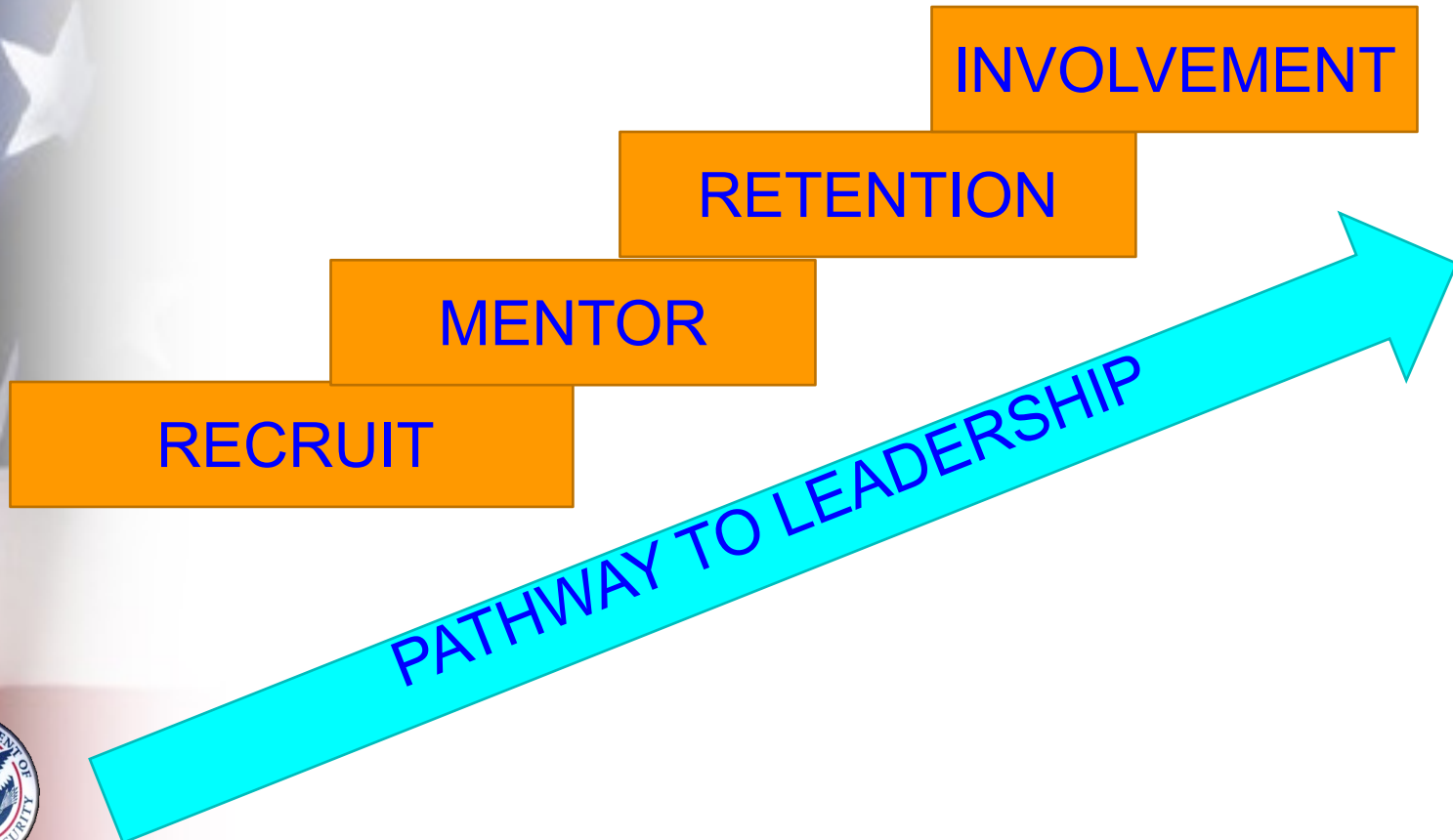


Mentoring New Members





Mentoring a Pathway to Leadership





Mentoring New Members by Communicating

Why Mentor?

**New Members are frequently lost in the
MORASS of Policies, Procedures, Processes
and Acronyms.**





Mentoring New Members by Communicating

- **Guiding, coaching, supporting.**
- **Showing an interest—being there.**
- **Share Information, knowledge and skills.**
- **Develop a PLAN.**
- **Setting Goals.**
- **Monitor progress.**
- **Giving Feedback.**





Mentoring New Members

FSO- Member Training (MT) ...To Do:

APPOINT Mentor(s) to New Members





Member Training





Core Training

MANDATORY TRAINING (Once every 5 years)

Required to be performed by all Auxiliarists during their first year of enrollment and then once every five years thereafter:

- (1) Suicide Prevention.
- (2) Security Education & Training Awareness.
- (3) Privacy Awareness.
- (4) Prevention of Sexual Harassment.
- (5) Sexual Assault Prevention.
- (6) Civil Rights Awareness





Core Training

MANDATORY TRAINING

Required to be performed only once by all Auxiliarists (new members during their first year of enrollment):

- (1) Introduction to Risk Management
- (2) Ethics Training
- (3) Influenza Training.





Core Training

Remember.....

If CORE training is not completed which require renewals every 5 years, members go REYR in ALL quals and hence, cannot be Assigned to Duty.

- A member can not hold elected or appointed office.
- A member will not receive awards, orders, or receive travel or fuel reimbursement without CORE Training and Intro to Risk Management course.





Member Training

FSO-MT - Member Training:

FSO-MT must be an Aux Instructor

- Exercise staff responsibility and supervision over all matters pertaining to the flotilla member training program, and keep flotilla members informed of all developments in the program.
- Maintain close liaison with the Division Member Training Staff Officer (SO-MT)
- FSO-MT is not required to conduct all of the actual training.
- Coordinate with the FSO-IS to assist in maintenance of member qualification records.





Awards





Member Awards





Member Awards

The recognition of Auxiliarists for their service through the presentation of timely and appropriate awards is essential to the success of the Auxiliary Program.

Auxiliary and US Coast Guard awards are the only “compensation” available to our members and need to be given out whenever an act or service warrant special recognition





Member Awards

- Originator references the **Coast Guard Medals and Awards Manual and AUX Manual** to determine if a member's action is worthy of an award. (D11s.org website)
- Draft and submit the award through the COLM to the D11s Awards Board
- D11 South Awards Board decides whether the award meets the criteria for approval.
- Upon receipt at the DIRAUX Office, award is reviewed by office staff. If approved, the award is sent to the Director for final vetting, approval, and signature.





Member Awards

7 Steps (Development to Submission)

1. **Gather Performance Data on the Member**
2. **Develop Bullets on member's performance**
3. **Decide on the Level of the Award**
4. **Draft the Citation**
5. **Edit the Citation**
6. **Complete the CG-1650**
7. **Submit to the Chain of Leadership**





Uniforms



Uniforms



© Patrick Newburn



Uniforms



Document Review:

AUXILIARY UNIFORM AND APPEARANCE POLICY



Uniforms



- Elected and appointed officers are expected to wear the uniform properly to set an example.
- Auxiliarists in a membership status other than Approval Pending (AP) or retired shall undergo a uniform inspection each calendar year performed and validated for AUXDATA II entry purposes by their FC, VFC, IPFC, or other elected officer
- If an Auxiliarist does not own an Auxiliary uniform, they may be recorded in AUXDATA II as **exempt** from this requirement.



Uniforms



- Auxiliarists who do not undergo this uniform inspection requirement during the calendar year shall lose their currency and eligibility to be assigned to duty. **(They shall be placed in REYR status!)**
- Uniform Inspection is an EDUCATIONAL process... NOT considered Pass/Fail. The Inspection may also be performed virtually.
- Any uniform may be inspected: ODU, AWU, Trops, Service Dress Blue, or Blue Blazer Outfit





Human Resources





Enrollment Application

Document Review:

- **AL AUX 036-24 Auxiliary Enrollment Application Update**





Conflict Resolution

Positive attitudes are contagious

Responsive actions to positive comments are almost always productive

Negative attitudes impact others in negative ways

Reactions to negative speech or actions are almost always unproductive





Conflict Resolution Process

1. Describe the specific conflict—get all facts
2. Name the people involved
3. Derive an action plan — assume there is a solution
4. Describe the results expected — eliminate emotion
5. Will a precedent be set?



Conflict Resolution Process



- Apply logic
- Accountability — find someone you trust to give you feedback on how things are going
- Do you need help? — Chain of Leadership
- ***REMEMBER: YOU WILL NOT PLEASE EVERYONE***





Conflict Resolution

- FCs are the front-line for diagnosing and handling potential disciplinary matters.
- Chapter 3 of the AuxMan discusses how to use counseling, Letters of Caution, Letters of Reprimand and other forms of disciplinary actions, including who can use them, and who can support the FC when needed.
- Consult with your DCDR before taking formal actions.





Conflict Resolution

- FCs must live by the oath that all Auxiliarists take to "abide by the governing policies established by the Commandant of the U.S. Coast Guard".
- Take action early on and document it when dealing with disciplinary matters.





Conflict Resolution

Awareness of these provisions and the specific Commandant policy statements for:

- the Auxiliary Policy Statement;
- the Equal Opportunity Policy Statement; and,
- the Anti-Discrimination and Anti-Harassment Policy; are essential elements that FC's must share with their Flotilla.



Legal Issues

Assignment to duty

- AUXMAN Chap 5.J. states: **an Auxiliarist is considered a Federal Employee and MAY be entitled to benefits coverage and protection when:**
 - Qualified for duty (quals current)
 - Properly assigned to duty
 - Acting within the Scope of Employment



Legal Issues



Assignment to Duty

- Auxiliarists that meet the above criteria MAY be covered for:
 - Personal Injury and/or death
 - Protection from Third party claims for:
 - Liability to injured parties
 - Property damage
 - Property damage to Auxiliary Facilities that are under orders
- Coverage DOES NOT extend to personal property of an Auxiliarist.





Legal Issues

Assignment to duty

- **The Auxiliary Manual specifically excludes en-route coverage to/from Flotilla meetings per ref (b) Ch 5.J.1.**
- **Recommend scheduling a member training session at meetings, then the Auxiliarist is en-route to a training session, and that MAY be covered, provided:**
 - **The training is on the agenda**
 - **Members have been notified of the training.**



Legal Issues

Contracts

- Only the Unit Commander has the authority to sign contracts and similar agreements.
- This authority cannot be delegated.
- Contracts must be reviewed and approved by the DSO-LP or ADSO-LP.
- Contracts and agreement that do not conform to rules, leave the signing Auxiliarist personally liable.



Legal Issues

DONATIONS/ SOLICITATIONS

All Flotilla, Division and District units are authorized to solicit and accept money or equipment/materials from community charitable organizations, commercial firms and businesses, provided such donors are strictly local in nature

Go to DCDR for guidance from ADSO-LP





BREAK





Flotilla Evaluation

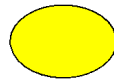
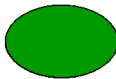




Flotilla Risk Calculation Worksheet

UNITED STATES COAST GUARD AUXILIARY
DISTRICT 11—SOUTHERN REGION
FLOTILLA HEALTH EVALUATOR

What is Your Flotilla's Health GAR Level?



Is Your Flotilla in Trouble? Evaluate your Flotilla's Health according to the categories and point scale given below:

My Flotilla has more than 25 active members - 1 Point	_____
My Flotilla has 10-24 active members - 2 Points	_____
My Flotilla has less than 10 active members - 3 Points	_____
My Flotilla has 1 Active Facility for every 5 or less members - 1 Point	_____
My Flotilla has 1 Active Facility for every 6 -10 or more members - 2 Points	_____
My Flotilla has 1 Active Facility for every 11 or more members - 3 Points	_____
My Flotilla holds regular Member Training Sessions - 1 Point	_____
My Flotilla occasionally holds Member Training Sessions - 2 Points	_____
My Flotilla does not hold Member Training Sessions - 3 Points	_____
My Flotilla regularly does CG and CGAUX Missions - 1 Point	_____
My Flotilla occasionally does CG and CGAUX Missions - 2 Points	_____
My Flotilla does not do CG and CGAUX Missions - 3 Points	_____
My Flotilla holds a 4th Cornerstone at least 4 times a year - 1 Point	_____
My Flotilla holds a 4th Cornerstone at least 2 - 3 times a year - 2 Points	_____
My Flotilla holds 0 - 1 - 4th - Cornerstone events a year - 3 Points	_____
My Flotilla has written goals and plans for growth, stability, and productivity - 1 Point	_____
My Flotilla has ideas of what it wants to do, but has no concrete action plans - 2 Points	_____
My Flotilla has very few or no goals and plans for the future - 3 Points	_____
My Flotilla meetings are well-planned, informative and fun - 1 Point	_____
My Flotilla meetings are not well-planned - 2 Points	_____
My Flotilla meetings are not planned - 3 Points	_____
My Flotilla Staff Officers do an excellent job - 1 Point	_____
My Flotilla Staff Officers do a average job - 2 Points	_____
My Flotilla Staff Officers do a poor job - 3 Points	_____
My Flotilla has identified multiple elected leaders for future years - 1 Point	_____
My Flotilla has identified elected leaders for next year - 2 Points	_____
My Flotilla has not identified any future leaders - 3 Points	_____
Total Points	_____

-  21-27 Points - Flotilla Failure is Imminent
-  11-20 Points - Flotilla Needs Improvement
-  1-10 Points - Flotilla Doing Well





Flotilla Risk Calculation Worksheet

Document Review:

1. Flotilla Health Evaluation - GAR
2. Know Your Members Quadrant





Flotilla Risk Calculation Worksheet

- GAR is based on a team discussion to understand and evaluate the risks attendant to flotilla success and how they will be managed. Risk management is what is important; not the ability to assign numerical values or colors to risk elements.
- The GAR model should be used as part of planning for flotilla success, and should be continually reassessed as we reach milestones within our plans, or as elements change.





Wrap-up





CONGRATULATIONS

Thank You

For Attending and Participating in the
2024 Flotilla Elected Leader Academy

