

U.S. Department
of Homeland
Security

United States
Coast Guard



SPECIAL COMMAND AIDE HANDBOOK

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"Expertly serving those few, who serve so many"

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“Special Command Aides are experts at serving those few who serve so many. We utilize our skills as household managers, procurement officers, enlisted aides and chefs to allow our flag corps to lead the Coast Guard more proficiently than they would be able to on their own. The visibility of our work is far reaching and touches the highest levels of government worldwide. This visibility is why Special Command Aides, the Special Command Aide Program, and our performance of all tasks big and small will only be the best.”

-FSCS James Swenson

CHAPTER 1: SPECIAL COMMAND AIDES

A. Program Overview.

1. Special Command Aides (SCAs) serve in a variety of assignments, including in a flag officer's representational facility (REPFAC) in order to create and maintain an environment suitable for that flag officer to conduct official business. The SCA's service provides the appropriate atmosphere for entertaining foreign dignitaries, government officials and other key stakeholders in order to further the goals of the Coast Guard.
2. This Manual serves as a guide and provides a fundamental understanding of the SCA Program. The information contained herein is a culmination of numerous regulations, directives, and practical experience. It attempts to recognize the unique requirements of the SCA position, and provide flag officers and their spouses useful information concerning SCA duties and responsibilities.
3. It is important to note that there are several SCA assignments outside of REPFACs including the Commandant's Flag Mess, the Department of Homeland Security Executive Dining Facility, and the White House. Though this Manual may be used as a reference by these individuals, its primary focus is on SCAs serving in REPFACs and as stated in enclosure (1).
4. For additional information regarding policies, procedures, and standards for maintaining and supporting Representational Facilities (REPFACs) and Flag Quarters see reference (a)

B. SCA Program Manager.

The SCA Program Manager, assigned to Commandant (CG-09), manages all aspects of the SCA Program. This individual should have had at least one successful tour as an SCA and should be a graduate of the Chief Petty Officer Academy. The SCA Program Manager shall:

1. Provide oversight and management of the SCA Program.
2. Advise, and provide information and guidance to flag officers, their spouses, and SCAs on all aspects of the SCA Program.
3. Monitor the SCA Program and resolve issues through the development of policy, standards, and doctrine.
4. Recruit, interview and nominate candidates for the SCA Program. Coordinate the selection and assignment process with key stakeholders as well as the flag officer and their spouse.

5. Conduct annual REPFAC visits with the goal of evaluating the condition and operations of the REPFAC. Evaluate the performance, knowledge and skills of the SCA, and relationship with the flag officer and their spouse. Visits will be guided by the SCA Program Manager REPFAC Quality Assurance Review enclosure (2).
6. Mentor and provide guidance to assigned SCAs on their duties and responsibilities, professional development and career counseling.
7. Develop, evaluate, monitor, and prescribe formal and on-the-job training for SCA personnel with the goal of maintaining the highest standards of excellence. Manage and execute the SCA Indoctrination Course. Maintain listing of approved culinary training institutions and courses.
8. Coordinate SCA Program issues with key stakeholder's e.g. Food Service Specialist (FS) Assignment Officer (AO), FS Program Manager, Fort Lee Joint Culinary Center of Excellence, TRACEN Petaluma, and the REPFAC Program.
9. Liaison with other military services on similar programs.

C. SCA Responsibilities.

SCAs are authorized for the purpose of maintaining the REPFAC, executing official events the flag officer or spouse may be hosting, and relieving flag officers of those minor tasks and details, which, if performed by the officers, would be at the expense of their primary military and official duties. The duties of the SCA shall be concerned with tasks relating to the military and official responsibilities of the flag officer, to include assisting in discharging their official Coast Guard social responsibilities related to their assigned positions. SCAs shall:

1. Assist with the care, cleanliness, and order of official entertaining areas within the REPFAC in accordance with reference (a). Serve as the property custodian for government-provided furnishings and equipment.
2. Serve as the liaison between the REPFAC and the flag officer's staff. Receive and maintain records of telephone calls; make appointments relating to the REPFAC/official duties and receive guests and visitors.
3. In accordance with reference (a), support the Area Housing Office (AHO) and Facility Engineer (FE) with site inspections, inventory reports, property reports, etc.

4. Assist with the development of the annual REPFAC budget and follow the approved spend plan as the designated government credit card purchaser. Generate Procurement Requests (PRs) as required in support of the AHO, FE, and Base Comptroller. Maintain daily procurement log and accounting ledgers for funds drawn from the flag officer and spouse's personal accounts.
5. Accomplish tasks that aid the flag officer in the performance of their military and official responsibilities, including; performing official errands, providing security for the REPFAC, and providing administrative assistance where needed.
6. Assist with the care, cleanliness and presentation of the flag officer's uniforms, and personal military equipment. Maintain a working knowledge of routine care, laundry and repair techniques to keep uniforms looking their sharpest.
7. Plan, prepare, arrange, and execute official social functions and activities, such as receptions and dinners. Assist with food preparation, menu development, table arrangements, table settings, greeting guests, arranging entertainment, bartending, and formal service.
8. Provide individual meals to the flag officer (as required) based on the flag officer's dietary constraints and personal preferences. Assist with determination of meal requirements and production of shopping lists for events and individual meals. Shop for food, beverages and household supplies, and coordinate with the flag officer and spouse for their preferred payment methods. Employ sanitation, handling and storage techniques in accordance with reference (b).

D. Restrictions On The Use Of SCAs.

1. Duties that contribute solely to the personal benefit of the flag officer or their family, or have no reasonable connection with the officer's official duties are inappropriate. Examples of tasks considered improper for an SCA to perform are:
 - a. Baby sitting, infant care, care of sick and elderly, care of pets.
 - b. Repair of private furnishings.
 - c. Repair of private motor vehicles or boats.
 - d. Washing and ironing of dependents' personal clothing.
 - e. Chauffeuring of dependent(s) and others for their personal benefit.
 - f. Accomplishing errands solely for the benefit of dependents.

2. These examples are guideline examples only, not an all-inclusive list. Notwithstanding, SCAs have an obligation to expend an honest effort and reasonable proportion of their time in the performance of official duties. Conversely, a flag officer shall not encourage, direct, coerce or request a subordinate to use official time to perform activities other than those required in the performance of official duties or authorized in accordance with the law or regulation. In all instances, a legal review is prudent prior to scheduling any non-official event.
3. Flag Officers can employ their SCAs during their off-duty hours on a voluntary, paid basis to perform duties. Payment of such services should be reasonable and commensurate with the service rendered. Deciding on a reasonable rate can be very complicated. Refer to the Bureau of Labor Statistics web site for further information.
4. Flag Officers may use SCA's to support social functions that are reasonably connected to the officers' military and official duties and responsibilities.
5. Social functions, even if not official, may satisfy the lower standard of "reasonable connection" to the Flag Officer's military or official duties. Same rules apply; Official function is the required place of duty, nonofficial is on a volunteer pay basis.

E. Implications Restricted Use Of SCAs.

These above restrictions became law when accepted by Congress in US Code Title 10, Chapter 349, Section 3639. It is important to remember that per IRS Publication 15-B, as long as a flag officer is using their SCA to assist them in their official business, the SCA is not providing a non-cash benefit that needs to be recorded as income. However, if the SCA does perform a strictly personal service, then the benefit is taxable income to the recipient. If one reports such services as income, they simultaneously admit breaking military regulations. If one fails to report such income, they may be violating Federal Income Tax Law. To sum this up, payment must be provided by the flag officer to the SCA for personal services to comply with all ethical rules found in the Joint Ethics Regulations. Further clarification on this topic can be found in the following:

1. Excerpt – The Army Lawyer DA PAM 27-50-355 enclosure (3)
2. FAQ's on use of Coast Guard & other resources for Changes of Command and Retirements enclosure (4)

F. SCA Assignment.

Assignment of an SCA to a REPFAC, as well as the White House Mess, Department of Homeland Security Executive Dining Facility, and the Commandant's flag Mess will follow the below criteria:

1. Selection Process:

- a. With the exception of an off-season vacancy, the selection process starts with the release of the flag officer assignment message.
- b. The Prospective SCA will notate which billets (REPFACs, DHS Executive Dining Facility, and Commandant's Mess) they are interested in serving at on their e-resume.
- c. The SCA Program Manager will coordinate with PSC-epm to develop a list of candidates for each particular billet once the assignment window has closed.
- d. Each flag officer will receive a list of candidates interested in serving at their REPFAC/prospective REPFAC. The list will be prioritized by the SCA Program Manager based on the candidates strengths in house hold management, enlisted aide duties, financial management and culinary. All lists will be distributed concurrently. Flag officers will review candidate packages, determine their candidate pool, and notify the SCA Program Manager.
- e. The SCA Program Manager will work with the flag officer or their staff to coordinate interviews. Interviews will be conducted based on the flag officers choices and seniority. Upon completion of interviews, the flag officer will inform the SCA Program Manager of their choice.
- f. The SCA Program Manager will pass the information to PSC-epm, who in turn will issue permanent change of station orders.
- g. The normal SCA tour length will be four years, with a minimum of two years of obligated service. Two year extensions may be granted with the endorsement of the flag officer, SCA Program Manager, and PSC-epm. If an E-6 in an E-6 SCA billet advances to E-7 during their assignment, they will complete a normal four-year tour, and extensions are not normally authorize.
- h. If the flag officer departs prior to the SCA completing their tour, the SCA will fulfill their obligated tour of duty at the currently assigned billet.

2. Proposed Interview Topics:

- a. Candidate's background and career goals.
- b. Expectations for duties, responsibilities and work schedule.
- c. Experience with executing formal dinners and receptions.

- d. Amount of entertaining, individual meal service to be provided on a daily basis and for official social events
- e. Candidate's ability to build and maintain a strong network of support; team-building skills.
- f. Professional Development.
- g. Mode of transportation when performing errands/reimbursement of fuel costs.
- h. Culinary strengths; preferred regional cuisines.
- i. Extra-curricular activities e.g. advanced education, family, part-time employment, coaching, etc.

G. Rating Chain.

The flag officer is responsible for supervising their assigned SCA and ensuring Individual Developments Plans and enlisted employee reviews are successfully completed. This does not preclude the flag officer from assigning a military aide or other key military staff member to serve as the SCA supervisor and manage expectations on their behalf. In cases where more than one SCA is assigned to the REPFAC, the flag officer (Or designee) will serve as the supervisor to the senior SCA. The senior SCA will serve as the supervisor to the junior SCAs. The rating chain shall be fully understood by the SCA and written into the command's organizational manual.

H. Training.

SCAs will receive initial training to establish those baseline skills necessary for success in their assignment. There are three main courses that will be provided via the Training Quota Management Center (TQC) to newly selected SCAs. Those courses are:

1. The Joint Services Enlisted Aide Program Course:

The Joint Services Enlisted Aide Program Course, taught at the Fort Lee Joint Culinary Center of Excellence, is a three-week course provided to all newly selected SCA personnel before arriving to their assigned REPFAC (or as soon thereafter as possible). This course familiarizes personnel with the policy, selection, personal attributes, and duties and responsibilities of individuals assigned to the personal staff of flag officers. The training course consists of the general policy governing SCA duties and responsibilities to include: purchasing of subsistence and supplies; government and personal equipment; financial and management administration; table service, china and silver, glassware and bar service; menu planning; seating arrangement; interior and grounds maintenance; crime prevention, counter terrorism and safety; and ethics, integrity, and family relations.

2. The SCA Indoctrination Course:

The SCA Indoctrination Course, hosted at Coast Guard Headquarters, is a one-week, hands-on training course provided to all newly selected SCAs after successful completion of the Joint Services Enlisted Aide Program. This course provides follow up instruction and practical application of learned skills. The course covers all aspects of the SCA's duties and responsibilities, as well as Service specific instruction regarding ethics, protocol, procurement, household management, etc.

3. The Advanced Culinary Skills Training Course:

The Advanced Culinary Skills Training Course, taught at the Fort Lee Joint Culinary Center of Excellence, is a very intense hands-on course designed to improve the overall skills of an experienced cook. It is not the place to learn or review basic cooking skills. Typically provided to the SCA after a year in the SCA program, the course focuses on knife skills, menu development, advanced baking techniques, buffet platter production and presentation, production of multiple course meals, (three, five, and seven course), effective purchasing techniques, advanced dessert preparation, table service, nutrition, and much more. The final event is a six, seven, or nine course meal prepared for 24 VIPs and guests. The entire class is responsible for designing, preparing and serving the meal. During this course, attendees are offered American Culinary Federation Certification.

4. It is recommended that SCAs attend a First Responder/Cardio-Pulmonary Resuscitation training course in order to gain the skills necessary to provide initial VIP assistance should a medical emergency occur. The course should be through a nationally accredited organization such as the Red Cross or American Heart Association and be funded by the local command.
5. If the flag officer and SCA identify the need for additional meals (above and beyond normal scheduled official events or other meals) necessary to maintain the SCA's culinary proficiency, the flag officer can have the SCA prepare necessary proficiency meals as individual meals for the flag officer at their personal expense. This is most common at locations where the SCA has rare opportunities to exercise their culinary skills.
6. A REPFAC should be holding 1 reception per month minimum. Staying at or above this minimum will keep the SCA's skills current.
7. The SCA may request and receive funding for other training courses through their local chain of command.

8. Further professional development options will be provided by the SCA Program Manager on the SCA portal to help guide the SCA's focus on approved organizations.

I. SCA Work Hours.

Flag officers lead a dynamic schedule that often involves official entertaining on evenings, weekends, and holidays, which can in turn make the work schedule of the SCA equally dynamic. It is the responsibility of the flag officer and the SCA to communicate expectations on balancing professional responsibilities with personal health and well-being, and family commitments and priorities.

The SCA's main responsibilities revolve around maintaining the REPFAC, executing official events the flag officer or spouse may be hosting, and those minor tasks and details, which, if performed by the officers, would be at the expense of their primary military and official duties. This does not prohibit the SCA from assisting the flag officer in other tasks if the schedule allows e.g. driving to and from official events, office support, support of other local SCAs and Dining Facilities, etc... However, these other duties should not detract from maintaining the REPFAC which is the primary reason for assignment of an SCA to a REPFAC.

The SCA must be gainfully employed with a regular work week and they must only take days off when leave is granted.

In order to monitor the utilization of the SCA and manage work schedules, the SCA shall utilize the Daily Communication Log enclosure (6) to communicate tasks and time allotted for each.

The SCA should communicate and coordinate work and leave schedules with the Flag Officer, the Flag Officers Spouse and the Admirals Aide.

Further guidance on optional duties for the SCA will be provided by the SCA Program Manager on the SCA Portal.

J. Communication.

1. The SCA's daily schedule is dictated by the requirements of the flag officer. The SCA should determine these requirements and develop a comprehensive work list to ensure proper utilization and accounting of their time through utilization of the Work Check-List enclosure (7).
2. The Joint Services Enlisted Aide Program Course prepares the SCA to produce a Continuity Book enclosure (8). While the SCA's duty description provides direction to determine a duty schedule, their specific duties depend on the needs of the flag officer and are tailored to the requirements of the household. The Continuity Book will contain information on all areas within the SCA's scope.

3. The following are examples of areas an SCA should document in the Continuity Book to assist in developing a duty schedule. Flexibility within that schedule is the key to success.
 - a. Housekeeping duties, items used, and frequency of tasks.
 - b. Landscaping requirements and frequency of tasks.
 - c. Uniform maintenance and laundering.
 - d. Menu planning and dietary preferences.
 - e. Shopping, method of payment and recording procedures.
 - f. Meal preparation, preferred methods, and presentation.
 - g. Arranging special functions: SCAs can arrange and provide services for official social (and recurring) events conducted by the flag officer in his or her assigned REPFAC or other designated location.
 - h. Record of events to assist with long range planning.
 - i. Miscellaneous duties and responsibilities.
 - j. Contact list.
 - k. Recruiting experienced help for large events.
 - l. Any pet concerns that may interfere with the SCA routine.
 - m. Pest control.
4. To ensure proper communication each SCA should be provided a designated workspace, located inside the REPFAC, with heat and/or air conditioning, a Coast Guard Standard Workstation, and an official telephone line (separate from the flag officer's personal telephone line) shall be made available to the SCA so they can successfully execute their duties.
5. The SCA should schedule periodic office visits in order to ensure they are meeting the expectations of the flag officer. Similar meetings with the flag officer's spouse are equally critical in attaining successful execution of their duties. These meetings are an ideal time to surface any problems, discuss career development, plan leave, obtain performance feedback and update the Continuity Book.

K. SCA Relief.

The relief process should take no more than five days. Upon completion, SCAs should file the SCA Relief Check-List enclosure (9) for their records and send one copy to the SCA Program Manager via email. This checklist is a compilation of items recognized as necessary for a relief or extremely useful to the incoming SCA. During the SCA's tenure at the REPFAC, they should continually add to this list. If there is something that makes an SCA say, "would have been nice to know during the SCA relief", it should be added to the list immediately.

L. Terms of Secondary Employment.

The SCA may be employed by the other military members on a voluntary basis for personal functions or services, but consideration needs to be made as to the perception of personal servitude when considering this option. Payment should be reasonable and commensurate with the services rendered, and comparable to any other caterer or contractor in the local geographical area. Items from the REPFAC cannot be used in a separate location for off duty employment. Deciding on a reasonable rate can be very complicated. Refer to the Bureau of Labor Statistics web site for further information.

If the SCA desires off-duty employment other than at the REPFAC, this employment must conform to Coast Guard Regulation.

M. Interpersonal Skills.

The SCA must develop a sense of responsibility, a professional demeanor, and a relationship with the flag officer, along with their spouse and family members. An SCA is a unique assignment, unlike any other FS job in the Coast Guard. However, to meet and exceed expected levels of performance, the SCA must be guided by the following basic principles.

1. The SCA should be courteous to everyone they meet.
2. The SCA should avoid involvement in the flag officer's private matters and must be discreet about the flag officer's personal and family affairs.
3. The SCA must realize the REPFAC is both their work space and someone's home. The SCA is in a position of providing technical advice in support of official functions or REPFAC maintenance requirements.
4. To meet and exceed expected requirements, the SCA must develop a sense of responsibility, anticipate what needs to be done, and do it.

5. The SCA should be conscious of their actions while in the REPFAC.
 - a. The SCA shall not receive or entertain personal visitors of any kind while at the REPFAC. Official visitors should be coordinated with the knowledge of the flag officer and their spouse.
 - b. The SCA shall not use tobacco products of any kind while on the REPFAC property.
 - c. The SCA shall present themselves professionally, and maintain a polite and courteous manner of speaking at all times, in person or by phone.
 - d. The SCA should always be aware of the special trust placed in them. The SCA should avoid situations, such as indebtedness, use of the flag officer's name or property for personal gain, or any other actual or perceived act that brings into question their integrity.
 - e. The SCA is expected to maintain a professional appearance and use appropriate military bearing and customs and courtesies. The SCA should maintain the following personal qualities:
 - (1) Honesty - The SCA should be trustworthy, they should be truthful and direct when dealing with others.
 - (2) Punctuality - The SCA shall be punctual when reporting for duty and in completing all assignments.
 - (3) Dependability - The SCA must be dependable. The SCA's superiors and associates should be confident that the SCA will exercise skill, good taste, and judgment in getting the job completed.
 - (4) Manners - Whether in Coast Guard uniform or civilian attire, the SCA should always be courteous and extend proper consideration and respect to others.
 - (5) Judgment - The SCA should be able to make quick decisions using sound judgment in determining what to do in a variety of situations.
 - (6) Loyalty - The SCA should be very discreet about personal and family matters that take place in the flag officer's household. The flag officer and family are entitled to their privacy. Observations of matters or incidents occurring in the flag officer's household should not be discussed with peers, associates or friends.

- (7) Counseling - The SCA should be mature enough to seek advice and counseling when a problem arises. The key to success is the ability to recognize a problem before it becomes serious.

N. Military Customs and Courtesies.

1. Introduction:

- a. A custom is an established usage. Customs include positive actions - things to do, and taboos - things to avoid doing. To an astonishing degree, people are eager to follow established practices. The realization that they are following a course that has been successful for others in similar circumstances bolsters their confidence, thus encouraging them to adhere to their course.
- b. If there is any one fundamental which underlies all proper social conduct, it is the consideration for the rights and feelings of others. While some of our social customs seem somewhat involved, all proper conduct originally springs from this fundamental. The knowledgeable Coast Guardsman's conduct will, at all times, be presented in such a manner that will cause the least embarrassment, discomfort, and inconvenience to those around. A Coast Guardsman, in social relations, should never forget this principle of consideration for others.
- c. Three of the most important expressions in your entire vocabulary are "please," "thank you," and "you are welcome." If you are thinking in these terms, chances are that you are headed in the right direction, even though you may be a little rusty on the particular rules governing a situation. There is an old military maxim that in the relations between seniors and juniors, "The senior will never think of the difference in rank; the junior will never forget it." This adage is just as true in social settings as it is in official settings. Adherence to this principle leads to ease and harmony. Violation of it often leads to unpleasantness and sometimes to outright embarrassment.
- d. During your career, you will meet literally hundreds of people, both officially and socially. The impression that you make on all these people depends very much on your social conduct in all its aspects: politeness, proper clothing, respect for seniors, table manners, courtesy to ladies, and correct correspondence. It is therefore in your best interest to become familiar with these procedures as soon as possible. You represent the entire Coast Guard in your actions and demeanor, and are often the only exposure individuals will receive of who a Coast Guardsman is.

2. Use of Sir or Ma'am:

- a. A Coast Guardsman in addressing a military superior uses the word "Sir or Ma'am" as does a courteous civilian speaking to a person to whom they wish to show respect. In the military service, however, the matter of who says "Sir or Ma'am" is clearly defined: in civilian life it is largely a matter of discretion.
- b. The proper, natural, and graceful use of "Sir or Ma'am" is something that comes with training and experience in the Coast Guard. Some fall into the habit easily; others must work at it.
- c. The use of "Sir or Ma'am" is used when speaking either officially or socially to any senior. The word is repeated with each complete statement. "Yes" and "No" should not be used in speaking to a superior without "Sir or Ma'am."

3. Senior's Place of Honor:

- a. Another military custom dictates that you should always walk or sit to the left of your superiors. For centuries, men fought with swords, and because most men are right handed, the heaviest fighting occurred on the right and the left side becomes defensive. Sailors and who were proud of their fighting ability, considered the right of a battle line to be a post of honor. Therefore, when an officer walks or sits on your right, they are filling the post of honor.

O. SCA Travel Reimbursement.

The SCA shall be authorized local travel entitlements, in accordance with Joint Federal Travel Regulations, when performing official errands for the flag officer or in support of the REPFAC and using their personally owned vehicle. The preferred mode of transportation when conducting official business is a government vehicle.

Typically representational facilities are not collocated or within a reasonable distance to a motor pool. Utilization of a personally owned vehicle is often more advantageous to the government. In these situations, the following apply:

1. Funding is the responsibility of the command to which the SCA is assigned.
2. The SCA shall verify funding availability prior to using personal vehicle to complete official errands. The flag officer's staff shall authorize the use of a personally owned vehicle each fiscal year via memorandum, as well as state that the use of a personally owned vehicle is more advantageous to the government if applicable.

3. The SCA shall complete all required travel reimbursement forms and submit them to their designated approving official for review in accordance with Coast Guard policy.
4. Instructions for Completing a Local Travel Claim will be listed on the SCA portal updated by the SCA Program Manager. For further support, speak to your local authorizing official.

P. Incoming Flag Officer and The Transition Phase.

One of the most difficult time periods for a flag officer, the spouse, and the SCA is the transition between flag officers. The SCA must understand that the expectations and job requirements may completely change. The SCA needs to remain flexible and meet the expectations of the new flag officer and spouse, treating the situation like it is a completely new unit. The following are the steps the SCA should take when the incoming flag officer and spouse report to the REPFAC.

1. Have the following manuals in binders ready for the spouse and flag officer to review:
 - a. Special Command Aide Management, COMDTINST M5300.13(series)
 - b. Representational Facilities (REPFACs) and Flag Quarters, COMDTINST 11103.1(series)
2. Explain the purpose of the Daily Communication Log and immediately put it into use to ensure good communication with the flag officer and the flag officer's spouse.
3. Have the Continuity Book Template and your REPFAC's current Continuity Book on hand and ready for review. Explain the following in regards to the Continuity Book.
 - a. While the SCA's duty description provides direction to determine a duty schedule, their specific duties depend on the needs of the flag officer and are tailored to the requirements of the household. These needs are listed in the REPFAC's Continuity Book.
 - b. The SCA's daily schedule is dictated by the requirements of the flag officer, and should be communicated and documented in the Continuity Book. Using the updated Continuity Book the SCA should develop work schedules to ensure the SCA's time is properly utilized.
 - c. The following are examples of areas the SCA's need to document in the Continuity Book within the first month of the flag officer's arrival:

- (1) Menu development, planning, and preferences.
 - (2) Shopping, method of payment and recording procedures.
 - (3) Meal preparation, preferred methods, meal requirements, and presentation.
 - (4) Housekeeping duties, items used, and frequency.
 - (5) Laundry and uniform maintenance.
 - (6) Management of REPFAC exterior and property.
 - (7) Arranging special functions.
4. At least two times during the first month, go over the Continuity Book with the flag officer or spouse and see what changes they would like to make.
 5. One month after the new flag officer has resided in the REPFAC, recreate the following in accordance with the updated Continuity Book:
 - a. Daily Communication Log
 - b. Daily Work Check-List
 - c. REPFAC Relief Checklist
 - d. SCA Event Checklist
 6. One month after the new flag officer has resided in the REPFAC, send an electronic copy of the updated Continuity Book to the SCA Program Manager for review.



"First impressions are lasting impressions. The way you choose to manage your Representational Facility is how you choose to represent yourself, your Admiral, and the Coast Guard."

-FSC Timothy Sullivan

CHAPTER 2: REPRESENTATIONAL FACILITIES MANAGEMENT

A. Household Manager Introduction.

One of the primary responsibilities of the SCA is to maintain the REPFAC to the highest standards. Execution of day-to-day operations to ensure the REPFAC is ready for official entertainment at a moment's notice involves many tasks, so flexibility and strong time management skills are essential to success. It also requires clear and continual communication between the flag officer, the spouse, and the SCA. Policies, procedures, and standards for operating and maintaining REPFACs are located in reference (a).

B. REPFAC Operations.

The SCA is responsible for the daily operations of REPFACs. There are many tasks to be performed or managed by the SCA. The SCA is required to clean and maintain the REPFAC while properly preparing uniforms and nutritious meals for the flag officer. The Daily/Weekly/Monthly/Yearly Work Check-Lists provides a means to establish the daily schedule. This list will be dynamic and require the SCA to update their Continuity Book and communicate with the flag officer and spouse to ensure needs are being met. For more details on specific cleaning methods and product usage, please review REPFAC Cleaning Recommendations located in reference (a) and the cleaning recommendations provided by the SCA Program Manger on the SCA Portal.

C. Reporting Damage.

SCAs should continuously survey the REPFAC for damaged or deteriorating surfaces areas where loose or cracked plaster, missing roof tiles, and any evidence of water intrusion or leaks, and report any decay or damage immediately. Deficiencies should be documented and tracked using the Work Order and Maintenance Log enclosure (10).

D. Security - Crime Prevention, Counter-Terrorism And COMSEC.

Crime prevention is everyone's business and SCAs should identify risks and use common prevention techniques to secure the flag officer's REPFAC.

1. Telephone Etiquette, Messages and Threats:

The SCA is the primary point of contact for the REPFAC. While it is important to be polite and professional, it is equally important to safeguard the privacy of the flag officer and their family. Establish standard operation procedures and list them in the Continuity Book.

2. Handling a Telephone Threat:

You must be aware of types of threats that may come into the REPFAC by telephone. Respond calmly and attempt to record all information concerning the individual that is calling. A good format to use is located on the Alcohol, Tobacco and Firearms webpage. Check with local/base military police, crime prevention section, and local security managers to ensure that you adhere to the correct procedures, or for more information regarding additional procedures available.

a. Attempt to keep verbatim record of the conversation/Make a record:

- (1) Stay calm, be courteous, and listen
- (2) Do not interrupt the caller
- (3) Make a written record of the conversation using an authorized form provided by your local security manager
- (4) Listen for and determine any code words used, if appropriate
- (5) A threat checklist can be duplicated and placed under or near your telephones for use, if necessary

3. Recognizing Crime Indicators:

Today's operational tempo requires that we are all aware of the current threat level. It is important to know the precautions to be taken and the procedures that are in place to deal with the potential for becoming a terrorist target. In advance of threat level changes have a plan to follow for each threat level. When changes in these levels occur, speak to the local security manager to assess whether measures in place at the REPFAC meet promulgated requirements.

- a. Nothing is more important than the security of the Flag Officer, their family and home. As an SCA you are the first line of defense in the security of that flag officer's home. It is imperative that you have a working understanding of what to do and who to speak to when such matters arise. These are the people who can assist with enhancing the level of security at the REPFAC and who will respond when called.
- b. Identify and be cautious of possible intrusion of the REPFAC or adjacent facilities. The information included in this section will identify likely intrusion or crime indicators to be aware of in and around REPFACs. You must become thoroughly familiar with established local policy covering threat and crime prevention. Possible indicators are:
 - (1) Location of unknown/unauthorized automobiles around the REPFAC.

- (2) Alarm system alert - Become thoroughly familiar with instructions and follow operating procedures. Read manufacturer's guide and seek assistance from your Security Manager or Housing on operating instructions. You may be required to check on the REPFAC during off hours if the alarm is activated and the flag officer and their spouse are away.
 - (3) Disturbed landscaping - Scan the area for obvious signs of intrusion (disturbed mulch, trampled bushes, shrubs, footprints in flower beds, or loose or disturbed crawl space doors).
 - (4) Report actual or suspected incidents to proper authority.
- c. Prevention Measures - You should be knowledgeable of crime prevention measures and consciously demonstrate an anticipation, recognition, and appraisal of a crime risk. Take necessary action that would tend to remove or reduce that risk.
- (1) Collect and turn in keys, papers, and tools found on grounds.
 - (2) Keep windows and doors locked.
 - (3) Remove mail and newspapers promptly from their boxes or yard/porch. Never leave these items in their boxes overnight. Check address for correctness or suspect of tampering. Ensure this also completed on weekends or non regular duty hours when the Flag officer is away on official business.
 - (4) Keep storage sheds, garages, and outbuildings locked, and check areas daily/weekly to ensure items have not been disturbed.
 - (5) Ensure shrubs covering windows are trimmed regularly.
 - (6) Avoid discussing functions with unauthorized personnel.
 - (7) Do not violate the right to privacy of functions by admitting to or discussing household matters or your job position with anyone.
 - (8) Dispose of sensitive information according to regulation and local procedures.
 - (9) Ensure backup lighting meets the needs of the REPFAC.
 - (10) Maintain an interior safe room, if applicable, and stock with emergency supplies and communications.

d. Screen Contractors and Maintenance Personnel:

- (1) Ensure workers have appointments in the particular REPFAC.
- (2) Check the person's identification card or badge before admitting.
- (3) Do not allow the person to wander around the REPFAC unescorted.
- (4) Remain with the person until the work is completed. If not completed, re-schedule.
- (5) Do not admit the person into the REPFAC should a situation arise casting doubt as to their identity or intentions.
- (6) When in doubt, execute your established security protocols.
- (7) Always follow local established crime prevention procedures.

e. Safes and all Top Secret Communication Devices

Check with local security managers, housing, telecommunication and internet personnel to ensure that you adhere to the correct procedures, receive proper training and or for more information regarding additional procedures available on all STE phones, SIPERnet, and Safe usage.

f. Maintain Key Locker:

Safeguard all keys used in the REPFAC. The SCA should discuss the security procedures of the quarters with the flag officer and spouse. The flag officer will identify the keys for which the SCA will be responsible. When keys are not in use, store them in a secure key locker. If the keys are lost, report it immediately to the flag officer or spouse. Obtain flag officer or spouse permission prior to changing the locks.

- (1) Prepare a coding system using letters and/or numbers to mark keys.
- (2) Do not mark keys with the name of the lock's location or items secured by the lock.
- (3) Do not duplicate keys without the permission of the flag officer or spouse.
- (4) Ensure that the coding system used for each key matches that used for each corresponding lock.
- (5) Return keys to the key locker after each use.

- (6) If more than one individual is authorized to access the key locker, establish procedures to ensure the security and accountability for the keys.
- (7) A list should be provided to the flag officer or spouse with the names and positions of all individuals with access to the REPFAC. This list should be updated when any changes are made and verified quarterly by the SCA.

E. Food and Beverage Storage and Sanitation.

Information on policies, procedures, the standards for Food and Beverage Storage and Sanitation is located in reference (b).

F. Refuse Disposal.

Garbage and refuse must be kept in durable fly and rodent proof containers. Lids shall cover containers at all times. Containers used indoors shall be periodically cleaned. Outside containers shall be stored on or above a smooth surface or nonabsorbent material that is kept clean, graded to prevent accumulation of liquid waste, and maintained in good working order.

G. Recycling and Energy Conservation.

Recycling is an important way to reduce the waste generated by REPFACs and reduce the negative impact of that waste. Recycling conserves our natural resources, saves landfill space, conserves energy, and reduces water pollution, air pollution and the green house gas emissions. It is important that each SCA puts effort to reduce, reuse, recycle and considers buying recycled products.

SCAs need to put much effort in saving energy to preserve the environment and save tax payers/flag officer's money. Saving energy mitigates the numerous adverse environmental and social impacts associated with energy production and consumption. These include air pollution, acid rain and global warming, oil spills and water pollution, loss of wilderness areas, construction of new power plants, foreign energy dependence and the risk of international conflict over energy supplies. Energy conservation extends the lifetime of equipment and reduces the maintenance cost by operating less hours and at less than maximum capacity. Please turn off lights and equipment when not in use, make sure dishwashers are full when being used and set to air dry, clean REPFAC air filters, set the refrigerator to around 37 degrees and freezer to 3 degrees, if sanitary wash with cold water, purchase energy star labeled appliances, and use compact fluorescent bulbs.

H. Public/Private Venture (PPV) Housing.

1. Privatized housing, also known as (PPV) housing, is owned by a private entity and governed by a business agreement in which the military services have limited rights and responsibilities. The PPV management company is typically responsible for maintenance and repair.
2. The AHO is the official liaison to the PPV contractor. The SCA shall assist the AHO as needed in coordinating maintenance appointments, ensuring utilities and services are available, and notifying the PPV manager with emergency maintenance issues.
3. The SCA should always keep in mind that the PPV staff and contractors may not perform or be required to perform of the standards of the flag officer. In some instances (including weeding, watering, light bulb changing) the SCA will need to perform basic maintenance instead of or after the maintenance has been performed by PPV staff.
4. Most PPV Managers will allow you to keep a stock of supplies that they are responsible for replacing (ie light bulbs, filters) if you are willing to offer “Do It Yourself.” support.
5. The workload of an SCA does not decrease in a PPV situation. The workload does change from self management to careful management of the PPV staff and contracts.
6. Constant communication and documentation of all work done are key to managing a PPV. A file needs to be maintained of all work performed in the PPV (work orders ect.)

I. Life Safety Standards.

The SCA shall support safety and environmental standards in accordance with chapter 1.H of reference (a). In addition, a defibrillator will be installed at an accessible location in the REPFAC and the SCA will be trained in its use.

J. Pets.

The SCA shall adhere to the pet policy that is established in reference (a).



“Commitment, Determination, Pride and the Coast Guard’s Core Values of Honor, Respect and Devotion to Duty are attributes that every FS in the SCA program must embody. The dynamics of our job require that we conduct ourselves in such a manner if we are to effectively, efficiently and accurately manage both the governmental and personal finances with which we have been entrusted by our senior leaders. This trust is the foundation of the Admiral-SCA relationship. Failure in this is to fail the very leadership we are here to support.”

- FSC Jason Stagnitto

CHAPTER 3: REPRESENTATIONAL FACILITIES FINANCES

A. Finance And Supply Manager Introduction.

Our professional knowledge of our REPFAC accounts, Coast Guard purchase methods, household funds management, inventory maintenance, contracting assistance, and proper use of representational funds builds a level of trust between the SCAs and our flag officers. We properly account for, spend, receive, and document our flag officers and the government's money and we help supervise contracts for much of the REPFAC maintenance. An important function of the SCA is to select and buy food for social functions in the REPFAC. The SCA must buy all types of subsistence commodities as well as general household supplies. The best stewardship and economy of funds in expenditures is necessary when dealing with the Flag Officers and tax payer's money. The SCA shops at the commissary, grocery store, international markets, and specialty shops. The SCA also buys common items such as soap, detergent napkins, and other general use supplies required in the day-to-day operation of the REPFAC. This section provides the SCA with a guide for buying. You should establish a good rapport with grocery store managers and meat and produce supervisors to assure you get the best assistance and quality in choosing foods. Knowing their finances are in trusted hands gives our flag officers peace of mind so they can focus more attention on the Coast Guard.

B. REPFAC AFC-30 and AFC-43 Finance.

All AFC-30 and AFC-43 funding, oversight and inventory accountability will be conducted in accordance with reference (a)

1. Government Credit Card Purchases.

When making a government credit card purchase, contact the Funding Official for guidance in the following circumstances:

- a. If the purchase is not on the approved REPFAC Spend Plan;
- b. If the purchase is over \$300;
- c. If it is furniture;
- d. If it is after August and before November; or
- e. If you or the Approving Official have any questions on whether or not you should be making the purchase.
- f. Contact your local Base Support Services Unit (BSSU) procurement office to be issued a government credit card and coordinate training and guidance on

proper procedures and process through the organizational program coordinator (OPC) or equivalent.

C. Record Official Expenditures.

You must maintain official records and receipts of expenditures for official events or functions related to the flag officer's official duties. Record entries accurately in a ledger and annotate required forms to show proper use of funds. Spending funds from an official account must be approved by a representative designated by the Flag Officer (Enlisted Aide/Protocol Office/Administrative Assistant) and reconciled by their designee immediately following (or at least by the next day of) any event using those funds. Receipts must accompany the Official Event Report which should include an Official Event Memo enclosure (11), Event Balance Sheet enclosure (12), and Event Menu enclosure (13). Further guidelines on the use of representational funds are listed in the Representational Fund Guidelines enclosure (14) .

1. Receipts:

Submit official expense records to designated office for accountability. Organize the official event memo, Event Balance Sheet, Event Menu and Store receipts:

- a. Add each subtotal on the Event Balance Sheet to gain an overall total.
- b. Attach all originals, copies, and receipts of purchases.
- c. Recheck all figures to ensure the receipt totals equal the total amount actually spent so that the balance to be turned in is accounted for.
- d. Forward documents to designated office or individual as required.

2. Official Records:

- a. Maintain duplicate copies of all official expenditures and receipts.
- b. Establish yearly files if you entertain less than 20 times a year or monthly files if you entertain more than 20 times a year.

D. Record Household Expenditures.

You must maintain receipts of expenditures and petty cash fund transactions for personal and household needs related to the flag officer's official duties. Record entries accurately in a ledger or use the Yearly Household Cost Report enclosure (15) to annotate use of funds. Balance petty cash funds regularly to verify accountability.

1. Purchases:

a. Personal Banking Accounts: (optional)

For accounting purposes, it is best to group these deposits and expenditures by month. Reconciliation of this ledger must be performed with the flag officer or their spouse monthly or as frequently as deemed necessary. The Monthly Household Cost Report can simplify this process.

(1) You will need to determine the preferred method of procurement:

- (a) Flag officer's Personal Bank Account Debit Card.
- (b) Blank check (personal, authorized) not recommended.
- (c) Pre-signed check (by flag officer or his or her designee.)

(2) Obtain Funds:

The method used to obtain funds and the manner in which they are spent encompasses a set of issues which are personal in nature and can only be determined by the flag officer.

(3) Receipts:

Regularly submit expense records to the flag officer or spouse for accountability. Organize the store receipts and itemized purchase lists. Attach all originals, copies, and receipts of purchases.

b. Petty Cash Fund: (optional)

The flag officer and spouse will establish the amount of cash to be maintained in the REPFAC's petty cash fund. These monies are for family personal needs that include laundry, dry cleaning, and related personal household items. Keep monies in a secure lock box in a designated location. When requested by the flag officer or spouse to make specified purchases from petty cash, make a note of those instructions given. Remove the appropriate amount from the cash box.

(1) Record essential information in a ledger or fill out required forms.

- (a) Date of transaction.
- (b) Locations of purchases.
- (c) Amount of money subtracted from the balance.
- (d) New or running balance.

- (e) Maintain purchase receipts in designated file or ledger.
- (f) Place change in the lock box and secure it.
- (g) On a regular basis, count the cash in the lock box to ensure the ledger balance and the lock box monies are equal.
- (h) Upon request from the flag officer or his spouse, provide the current balance of the petty cash fund.
- (i) Replenish petty cash fund upon instructions from the flag officer or spouse.

E. Purchase of Food and Beverages.

The purchases of food items must be made to provide menus with variety and adequate nutrition. Attention must be paid to the predetermined budget. Food items and beverages must be of exceptional quality, reasonably priced and purchased from a reliable source. Items must be stored in a manner to avoid deterioration and loss of flavor. Personal preferences for dietary or religious requirements must also be taken into consideration. Coordinating an organized well thought out shopping list will make this process easier.

1. Purchasing Food:

When purchasing goods for the flag officers you are entrusted with their funds to provide items of the highest quality. Check with the flag officer for specific shopping location for certain preferred items and brands and shop to obtain the best value per cost ratio. Use military stores if available in the local area to purchase food and beverages as much as possible, as these stores generally will offer better prices than stores on the economy.

2. Inspection of Perishables:

- a. Perishables consist of meats, fruits, vegetables, poultry, seafood, milk, butter, cheese, eggs (fresh, frozen, or cured meats, and fresh or frozen fruits and vegetables.) Check perishable items for signs of spoiling.
- b. Check meat, poultry, and fish to make sure they do not have an offensive odor.
- c. Check fresh fruits and vegetables to make sure there is no mold or rot.
- d. Inspect frozen foods for signs of thawing and refreezing.

- e. Press the package with your fingers to ensure that it is firm.
 - f. Make sure that the package is not hard on one side and soft on the other.
 - g. Check frozen meat products to make sure that there is no frozen blood in the containers.
 - h. Check the expiration date on dairy products to ensure it has not expired.
 - i. Look for signs of insect or rodent infestation.
3. Inspection of Semi-perishables:
- a. Semi-perishables consist of dried fruits and vegetables, canned goods, and packaged goods such as sugar, flour, or pasta products.
 - b. Check containers or packages of dry storage items for discoloration that indicates:
 - (1) Exposure to greasy substances.
 - (2) Exposure to moisture.
 - (3) Evidence of insect or rodent activity.
 - c. Inspect canned goods for leaks, holes, cracks, rust, or swelling.
 - d. Check the expiration dates on items.



"Our training and experience prepared us to be Food Service Specialists. Our desire to excel and attention to detail made us Special Command Aides. However, it is our thirst for knowledge and relentless pursuit of perfection that makes us Chefs."

-FSC Andrew Proulx

CHAPTER 4: ENLISTED AIDE AND UNIFORMS MAINTENANCE

A. Enlisted Aide Introduction.

The SCA's attention to detail and proficiency in assisting with the care and set up of the flag officer's uniforms, as well as knowledge of traditions and protocol during social events, ensures guests leave with the best impression of the Coast Guard. Understanding protocol, preparing uniforms, and performing tasks that aid the flag officer in the performance of military responsibilities allow more time for them to lead the Coast Guard.

B. Uniforms.

Specific information on the set up of the flag officer's uniforms is located in reference (c). It is highly recommended to keep photos of each of the flag officer's uniforms as a reference as you care for them.

1. Maintain Uniforms

The SCA will maintain the flag officer's military uniform wardrobe as required, including accessories and shoes, in accordance with reference (c). The SCA shall not be utilized for the care and maintenance of civilian clothing unless it is to be utilized for official purposes.

a. Maintaining dress shoes:

- (2) Brush off shoes to remove sand, dirt, grit, etc.
- (3) Use appropriate shoe polish as per the flag officer's preference when polishing shoes.
- (4) Place "shoe trees" in the shoes to retain their shape if the flag officer so desires and supplies them to the SCA.
- (5) Position shoes neatly in the appropriate storage area when required.

b. Replace ribbons, decorations, and rank insignia, as required:

- (1) Replace worn, soiled, and torn items with new ones.
- (2) Always check with the flag officer before removing any items.
- (3) The flag officer is responsible for funding the uniform attachments, but the SCA may be utilized to purchase the specific items needed by the flag officer.

c. Clean brass items:

- (1) Use the appropriate metal polish provided by the flag officer.

d. Storage and handling of uniforms and accessories:

- (1) Thoroughly brush uniforms immediately after each wearing.

- (2) Use a good cleaning fluid to remove any spots or soil from uniforms.

- (3) If uniform items require dry cleaning, verify with the flag officer any particular instructions to provide the cleaner's service personnel.

- (4) Inspect and remove any items from all pockets and trim any loose threads.

- (5) Hang trousers at full length.

e. Remove spots and stains:

- (1) Do not remove spots or stains without prior approval from the flag officer or spouse.

- (2) Read and follow manufacturer's instructions and techniques when using a commercial stain and spot remover.

f. Replace buttons:

To replace or tighten, stitch through the original holes with matching thread.

g. Repair tears and worn areas on uniform:

All repairs should be completed by a professional. If instructed by the flag officer, the SCA will handle the logistics to have repairs completed.

h. Official uniform shirts:

- (1) Clean, press, and keep free from defects.

- (2) If required, the SCA will wash and iron the flag officer's uniform shirts.

- (3) Confer with the flag officer or spouse for any special handling or laundry instructions.

- (4) Inspect and check all pockets, removing any items. Check for loose, broken, or missing buttons. Carefully trim any loose threads.

- (5) After the shirts are dry, hang them each on a clothes hanger. Plastic or wooden hangers are recommended. Avoid using metal hangers because of possible rust stains.
- (6) Use a light, warm iron, set on wash and wear to remove wrinkles, and to sharpen creases if required.
- (7) Ensure the correct setting of the iron for the type of material the shirt is made from.
- (8) Avoid ironing over buttons to prevent them from cracking or melting
- (9) Do not use bleach, fabric softener, spray starch, or any other laundry product without specific instructions from the flag officer or spouse.
- (10) Return cleaned and ironed shirts to the designated room or closet identified by the flag officer or spouse.

2. Prepare Uniform for Wear:

The SCA should be familiar with the proper wearing of the Coast Guard uniform as prescribed in reference (c).

- a. Care must be provided by the SCA to ensure the flag officer's uniform appearance has no discrepancies. The SCA must resolve the following discrepancies and inform the flag officer if replacement is necessary:
 - (1) Scuffed shoes.
 - (2) Tarnished belt buckle.
 - (3) Lint on the uniform.
 - (4) Combination cover not clean.

3. Uniform Standards for SCAs:

SCA personnel are required to maintain the proper grooming standards and basic uniform requirements listed in reference (c).

- a. The SCA will receive an initial issue of attire listed in reference (c) under Organizational Uniforms. The SCA uniform issue consists of five blue polo shirts, five black slacks and four completely white chef's coat with white buttons and no piping.

- b. These uniforms will be budgeted and purchased with appropriated funds allocated in support of the REPFAC. The SCA is authorized replacement uniforms, five of each item, on an annual basis if necessary due to wear and tear during the year.
- c. The SCA shall bear no cost for prescribed SCA uniform requirements, and will use their uniform allowance to maintain an inventory of the required uniforms stated in reference (c).
- d. Formal attire may be prescribed for certain events, and include jacket or vest and bowtie or necktie, or any combination the flag officer and their spouse prescribe for the event.
- e. If casual civilian attire is authorized to enter or leave the quarters, such clothing will be clean and appropriate for the environment the SCA works in. Casual attire does not include shorts, shabby jeans, or tee shirts.
- f. In accordance with the reference (c), SCAs wear an aiguillette for identification to facilitate the performance of their duties in support of their flag officer. The visual identification facilitates support of the flag officer's mission and prevents confusion during official occasions. SCAs may wear the aiguillette only while performing the duties assigned. Aiguillettes are furnished and remain in the custody of the REPFAC. SCAs wear a blue aiguillette on the left shoulder. Service aiguillettes are worn with Service Dress, Tropical Blue and when authorized, the Winter Dress Blue Uniform. Service aiguillettes are not authorized to be worn on the Operational Dress Uniform (ODU).
- g. The SCA uniform is the equivalent to the Operational Dress Uniform in regards to official business. If you are attending meetings, ceremonies and appointments you must switch out to the Uniform of the Day.

C. Phone and Personal Messages.

As the SCA, you are required to take telephone messages and messages from REPFAC visitors.

- a. Receive the message:
 - (1) Write down exactly what they say.
 - (2) Read the message back to ensure accuracy. Example: "May I please read the message back to you to be sure I have recorded it correctly?"
- b. Record essential elements of information:
 - (1) Name of the person they wish to leave a message for.

- (2) Name of the person and/or organization leaving the message.
- (3) Message.
- (4) Phone number of messenger.
- (5) Your name (individual taking the call/message).
- (6) Date and time.
- (7) If the message was taken from the personal phone, official line or personal visitor.

c. Pass the message:

- (1) If the person is available, give the message to the individual promptly.
- (2) If the person is not available, place the message in the designated location.
- (3) When the person arrives, ensure the individual gets the message promptly.



"We have become advocates, the theory of attention to detail and the difference it makes in the quality and appearance in not only our cooking but in everything we do. We have learned that perfection is a goal which is never fully attainable but can be a worthy goal nonetheless. With the guidance of our peers we will continue to endeavor to express ourselves as artists through our craft and paint palatable works of art upon the blank canvases of the kitchens which lay before us."

- FSC Stephen Bishop

CHAPTER 5: FOOD SERVICE AND SPECIAL EVENTS PROCEDURES

A. Military Chef Introduction.

Our passion for culinary excellence and service expertise displays the Coast Guard to the highest ranking government officials as professional, efficient, and talented. Many high ranking officials' only contact with the Coast Guard is through the SCAs and the work they display. To an SCA it is work, but to an outsider looking in, the visibility of our REPFACs, Commandant's Mess, DHS Executive Dining Facility and the White House is awe-inspiring. The entertainment and service we provide our flag officer's guests allows work to be conducted in a relaxing, welcoming and satisfying environment. When a guest is satisfied, business and negotiations become easier for our flag officers to conduct. When a guest is comfortable, friendships are formed. The power of these negotiations and friendships to the Coast Guard, in the present and in the future, are immeasurable. Providing great service to our flag officer's guests allows our flag officer to negotiate and network more efficiently for the Coast Guard.

B. Entertaining And Planning.

1. Introduction:

Through calendar meetings, protocol requirements, and input from the host/hostess, a great many social events will appear on the horizon. Planning and preparing menu items, performing as chef, maître de, waiter and sommelier; preparing final disposition of goods, receipts and money, are all vital steps in the process of entertaining. When entertaining, preparation is everything. Many variables will come into play to disrupt your game plan. The more you prepare and foresee possible changes the more you increase your chances of success.

2. Planning:

Once there is a clear indication that an event is being planned there are many questions the SCA will need to ask to determine the direction to be taken.

- a. Determine what type of function is it going to be (Black Tie, Civilian Informal or Private Dinner, Breakfast, Luncheon, Tea, Cocktail Reception, Barbecue, etc.).
- b. Determine the relationship of the guests to the flag officer (Relatives & family, office personnel, subordinate commanders, U.S. officials, foreign dignitaries, etc).

- c. Determine dietary restrictions (Vegetarian, kosher, known allergies, etc.).
- d. Determine that there is funding in place.
- e. Determine the amount of staff necessary to perform the event and inform resources (other SCAs, local dining facilities, Auxiliary Chefs) of support needs.
- f. Once all information is gathered prepare a Event Check-List enclosure (16) consisting of a menu, 3 day prep list, day of prep list, day after prep list and shopping list.

3. Preparation:

As the host answers the above questions, the SCA will be able to determine what tone the event will take on. The SCA can begin to make determinations as to the level of grandeur, what type of table setting, which set of china, stem ware, flatware, and linens, are required. Menu development should also begin to take form. Some of the requirements to consider are:

- a. What time of day this function is taking place and how much time is allotted?
- b. How much time can realistically be dedicated to food preparation without taking away from house cleaning, uniform maintenance and military requirements?
- c. What are the local specialties of the area and what foods are in season? Visiting guests usually enjoy a sampling of the local fare.
- d. Make a detailed shopping list. Don't forget to consider every aspect from flowers to cleaning supplies. Shop as early as possible to ensure availability of goods-- shop as late as possible to ensure freshness of perishables.
- e. A simple, well-balanced and well-prepared meal is preferable to one that is elaborate but poorly prepared.

4. Protocol:

The Protocol Office or flag officer's aide will be very helpful in determining official protocol requirements. They will provide official gifts when needed as well as all the normal printed items. Some of the items provided by protocol are:

- a. Menu cards
- b. Seating Chart.

- c. Place cards (first name printed on the back)
 - d. Guest book card.
 - e. Points of contact for entertainment.
 - f. It is recommended that the REPFAC have capabilities to print these items in case of last-minute changes.
5. Recipe Guidelines:
- a. Select recipes from reliable sources and compare with similar recipes from different sources.
 - b. Determine availability of ingredients.
 - c. Determine if the recipe can be prepared with existing kitchen facilities.
 - d. Convert the recipes to the amount of portions that will best be suited to the operation or occasion.
 - e. If the flag officer would like to test a dish before an event, the flag officer can have the SCA prepare this dish as an individual meal for the flag officer at their personal expense.
 - (1) Evaluate the preparation capability of the equipment, cooking methods used, and experience of the staff. During the evaluation, make notes and corrections in procedures and methods used.
 - (2) Determine if the recipe is cost effective in terms of preparation and cooking time.
6. Purchase List:
- a. Prepare a complete shopping list of items to be purchased.
 - b. Always check with host/hostess for recommendations.
 - c. Conduct an on-hand inventory of food items and other required items.
7. Arrange Seating:
- a. All REPFACs should be outfitted with a table that holds a minimum of 10 people comfortably.
 - b. Select the appropriate table setting for the particular occasion.

- c. Select and place appropriate (matching) table linen, place mats, and napkins on the table.
8. Prepare Decorations:
- a. Ensure that the centerpiece conforms to the theme of the occasion.
 - b. Ensure that the colors in the centerpiece or arrangement harmonize with the colors of the table service, tablecloth, and napkins.
 - c. Ensure the centerpiece container is as much a part of the setting in quality, texture, and color as the chinaware, crystal, and silverware.
 - d. Place the centerpiece where it contributes to the interest and charm of the complete setting. The size of the centerpiece depends on the size and shape of the table, but it should not be so tall or large that guests cannot see over it.
9. Serve Meal:
- a. Always serve from left, remove from the right.
 - b. Always consult with the host or hostess for any service preferences or variations.
 - c. Use of a Base Plate (charger) – The SCA should discuss this with the host and hostess prior to an event to establish a standard for the house. Normally the place setting should not be left empty while the rest of the table is being cleared unless it is the dessert course, so the base plate remains through the main course. Then the entire table is cleared to include salt and pepper shakers.
 - d. After the initial service of plate settings, the preferred method of plate removal is to remove the place settings from the table, two diners at a time, until the table is cleared and then begin serving, carrying two plates at one time.
 - e. When using more than one server, one server starts meal service with the person to the right of the host and the other server starts with the person to the right of the hostess.
 - f. Never reach in front of the guest.
 - g. Plan strategy in advance so service will run smoothly.
 - h. Glasses should be removed from the right to avoid reaching across or in front of the guests.

- i. One Server – For up to eight guests - Serve the woman to the right of the host. Continue to serve clockwise around the table.
- j. Two Servers – For eight or more guests - First server will serve the woman at the right of the host; second server will start with the guest of honor employing “mirror service.” Continue to serve counterclockwise around the table serving the host last.

10. Cleaning:

- a. Clean and restore kitchen and serving area - after service is complete and the guests are finished, the area must be cleaned prior to departure.
- b. Remove all tableware to the appropriate area for washing, drying, and storing.
- c. Remove linens and napkins to the appropriate location to be laundered and stored.
- d. Dispose of, hand out, and store leftovers at the flag officers discretion. Store leftover foods in proper containers in appropriate storage areas.
- e. Wash, dry, and store tableware, serving dishes, pots, pans, and other equipment.
- f. Ensure that kitchen, dining, and serving areas are restored to a clean and orderly manner.
- g. Reposition furniture to its original location.
- h. At all times, while guests are present, all staff must be as quiet as possible. With many appliances running, the kitchen tends to be louder than the dining room. Many noises and voices cannot be heard well in the kitchen carry clearly into the entertaining spaces increasing the chances for disruption or embarrassment.

C. Types of Occasions.

1. Brunch:

A brunch is similar to any formal luncheon or dinner. It is usually served between 1100 and 1300 and consists of a combination of breakfast and lunch. Items typically found on a brunch menu consist of; ham, quiche, fruit compote, muffins or scones, sweet rolls or pastries, fruit juice, coffee or tea.

2. Coffee:

A Coffee is an informal entertainment that is popular for spouses of a unit and held on a weekday. It provides an opportunity for spouses to get acquainted informally. A Coffee is usually held between 1000 and 1130 and the menu is similar to breakfast. Items typically found at a Coffee consist of coffee, tea and punch, pastries – sweet and savory, a variety of finger foods, fresh fruit platter, or a special dessert.

3. Luncheon:

Most luncheons are official occasions frequently held in honor of a visiting dignitary.

- a. Luncheons usually start at noon or 1300.
- b. Formal luncheons have three or four courses.
- c. Informal luncheons can only have two courses.
- d. Cocktails are offered approximately 30 minutes before the meal is served.
- e. One wine is customarily served at the luncheon table if that is the desire of the host. Light wines are usually served at luncheons.
- f. Menus are simple, such as; quiche with a salad, salads and sandwiches, fruit, or a special dessert may be served.

4. Tea:

A Tea is a "get together" given to meet a house guest or a special person. Often a special person is honored and the guests greet that person in a receiving line.

- a. Teas for a few or many guests usually start at 1600. They may also be held at a time designated by the host; any time between the hours of noon and 1600 may be appropriate.
- b. The tea table is always covered with a lace or an elaborate cloth.
- c. The food served at a tea could consist of; tea, punch, dainty finger foods, sandwiches and small cakes, small rolls or biscuits filled with hot creamed chicken, small tarts, pastries, cake, nuts, and mints.

5. Buffet:

A buffet meal is a favorite form of serving many guests in a small space with or without help. Guests serve themselves from a buffet table and eat in designated locations throughout the house. The host or hostess may choose to pass the foods again or ask the guests to return for seconds.

6. Cocktail Reception:

This is a type of event to say hail and farewell, to entertain special guests, or just to visit socially. Cocktail receptions vary in size from a handful to many people. These events are customarily held during or near the close of daylight hours as desired by the host or hostess. A choice of drinks should be made available. Finger foods and heavy or light hors d'oeuvres may also be served.

7. Reception:

Formal and informal receptions are large events held to honor individuals, couples, or groups. At formal receptions guests go through a receiving line.

- a. Receptions are held at various hours, according to their nature, with less formal affairs frequently held from 1800 to 2000.
- b. Foods served at receptions are as simple or as elaborate as the host desires and the occasion requires.
- c. One room is usually set aside for food, but more rooms may be needed at large receptions.

8. Formal Dinner:

Formal dinners are multiple course sit down meals held to honor high profile guests. The best culinary and service practices should be displayed while performing a formal dinner.

- a. Have the EA or protocol officer designate dinner partners and tables by seating charts
- b. Put place cards on the tables.
- c. Serve hors d'oeuvres for the first 30 minutes.
- d. Serve dinner for the next 1 - ½ hours.

- (1) The SCA will be preparing food items using most of the heating appliances. This will raise the temperature of the room by several degrees. If the dining room is too warm, several hours before dinner, the SCA should inform the flag officer or spouse to receive permission to lower the temperature appropriately for a comfortable atmosphere throughout the dinner.
 - (2) As with all entertaining, the SCA should avoid making loud noise from cleaning up or small talk with other members helping with the dinner and throughout the meal. If the kitchen is close to the dining room, this could detract from an otherwise wonderful evening.
 - (3) The SCA should be relaxed throughout the dinner and avoid hurrying a guest to finish a course. The SCA should also not circle the table every minute to remove dishes, nor should the SCA be away from the table when the guests have all finished with the course. This requires a careful balance of prompt service and an unobtrusive presence.
 - (4) The SCA should have a sense of how long each course should take and plan accordingly to complete the movement of plates by course. On average, expect a minimum of 5 to 10 minutes for guests to complete each course with the main course taking a bit longer. The SCA and service personnel should take this time in between service to offer water and wine and to get ready for the next course. After replenishing the beverages, the service staff should leave the dining room for a few minutes to let the dinner party engage in conversation without interruption. The service staff should wait until all of the guests have finished with their course before returning to the table and remove dishes.
- e. All dishes should be removed promptly, quietly, and neatly (not stacked) returned to the kitchen. Do not hurry any guests. No one should feel rushed.
- f. Plan the menu taking in consideration any food allergies or dislikes.
- (1) A well-planned menu is a primary requirement for a formal meal. The menu must consist of gourmet items suitable for the occasion.
 - (2) Menus for formal meals vary according to the kind of meal, guest of honor, and season.
 - (3) If wine is served, plan accordingly for a choice that is best suited for the main course unless you are offering a different wine per course.
 - (4) Consider the number of guests who are expected to be served to plan for amount of support staff needed.

g. Formal Dinner Examples:

- (1) A nine-course dinner could be, hors d'oeuvres, amuse-bouche, appetizer, soup, fish, sorbet, main course, salad and dessert.
- (2) A seven-course dinner could be hors d'oeuvres, amuse-bouche, soup, salad, sorbet, main course, and dessert.
- (3) A six-course dinner could be hors d'oeuvres, appetizer, soup or salad, sorbet, main course, and dessert.
- (4) A five-course dinner could be hors d'oeuvres, soup or salad, sorbet, main course, and dessert.
- (5) A four-course dinner could be hors d'oeuvres, appetizer/soup/salad, sorbet, main course, and dessert.
- (6) A three-course dinner could be appetizer/soup/salad, main course, and dessert.
- (7) Serve bread with the meal only if requested by the host/hostess.
- (8) Serve coffee after dinner.
- (9) Serve liqueurs, but not at the dining table.

h. Who is Hosting:

If a woman is hosting the occasion, and the seating arrangements are alternating men and women, then serve the woman first to the right of the hostess. If a man is hosting the occasion, then the woman to the host's immediate right will be the first person served and the host will be served last.

i. Foreign Countries:

- (1) When serving guest from other countries research the customs they observe and be ready to adapt to what makes them feel most comfortable. Some of the following customs could be:
 - (a) Serve all women before serving the men.
 - (b) Continue serving clockwise, ending with the hostess.
 - (c) Men and women will leave the table together to go into the living room for demitasse, liqueurs, and mints.

j. Table Settings:

- (1) The basic rule in setting any table, formal or informal, is to avoid crowding.
- (2) There should be at least 24 inches of table space for each person.
- (3) Everything on the table must balance and be aligned with its matching pieces.
- (4) Place the centerpiece in the middle of the table and balance the other decorations around it.

k. Formal Meal Table Settings:

- (1) The formal meal service is the most important of all the table arrangements. Figure 1 m below depicts the correct place setting for each course at a formal dinner. The diagram on the left is set for a soup, salad, main course and dessert. The diagram on the right is set for a soup, main course, salad and dessert.

- (a) Charger or Base Plate
- (b) Dinner Knife
- (c) Dinner Fork
- (d) Salad Knife
- (e) Salad Fork
- (f) Soup Spoon
- (g) Dessert Spoon & Fork
- (h) Salt & Pepper Shaker
- (i) Name Card
- (j) Bread & Butter Plate w/knife
- (k) Water Glass
- (l) Red Wine Glass
- (m) White Wine Glass
- (n) Champagne Glass

(o) Napkin

(p) Menu Card

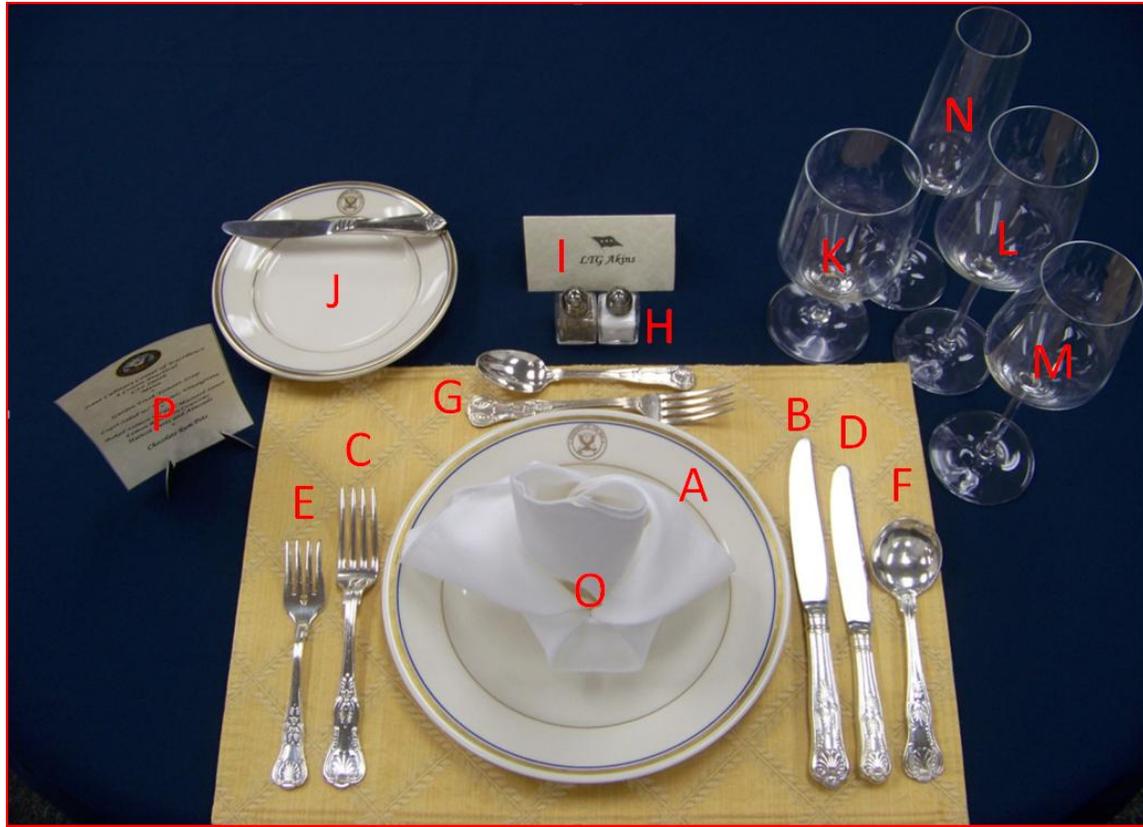


Figure 1

D. Table Linens and Coverings.

1. The traditional formal dinner table is covered with a white or ivory damask tablecloth. The modern white or pastel colored cloth of damask, lace, or linen may be used. Place mats of the same materials may also be used.
2. The tablecloth should not hang over the table more than 18 inches, nor less than 12 inches. A silence pad should fit the top of the table, flush to the edges, with the table cloth placed over the pad. Ensure the tablecloth hangs evenly on all sides.
3. Matching napkins should be placed for each guest. Lace, linen tablecloth or placemats may be used for the formal luncheon table. Cocktail napkins are used before the luncheon or dinner and may be cloth or paper.
4. Candles - If candles are chilled for several days before use, they will drip less and burn longer.

E. Functions and Events Hosted Outside the REPFAC.

The SCA may be required to serve at an official event away from the REPFAC in support of their flag officer, or assisting other SCA personnel in the local area.

1. The SCA may be supporting their flag officer while they host working breakfasts, luncheons, coffee service, etc. The SCA is expected to perform in the same professional manner as expected at the REPFAC.
2. In some cases when more than one REPFAC is located within the local area, the SCA personnel shall create a team concept where they are coordinating with each other and their flag officer or spouse to assist each other so there is no conflict from duties and projects (not of an emergency nature) that otherwise would be performed by the SCA during their regular work day.
3. The SCA should plan ahead so supporting the other local SCA is not averted by regular duties like uniform maintenance, or cleaning and upkeep of their assigned REPFAC. There should be no need for the SCA to return to their REPFAC and perform these duties if their assistance at the other REPFAC was for a full day of work.
4. Because the SCA is not required to provide the flag officer and spouse with daily meals, this would not interfere with providing assistance at another local REPFAC in support of official events.
5. Food service sanitation is the application of approved sanitation practices to prevent or reduce the incidences of food borne illness. The SCA must be familiar with the Coast Guard policies on sanitation. Please Refer to Reference (b). Food Service Sanitation Manual, COMDTINST M6240.4(series)

F. Beverage Service.

1. Beverages are to be served from the diner's right if possible.
2. The server should never lift the diners' glasses or cups from the dining table to refill them. Rather, he or she should pour the beverage into them while they are on the table. If the cup or glass is not conveniently placed for service, carefully move it to a better location. If it cannot be reached, politely ask the diner to move it.
3. The order of service for beverages is the same as that for the serving of foods.

4. Try not to fill serving pitchers to the top when used for filling glasses or cups at the dining table. A full pitcher is difficult to handle and feels quite heavy after a while. Therefore, pitchers should be filled between one-half and two-thirds full. Finally, you must remember that each flag mess may have certain rules for serving beverages.

G. Stocking and Setting Up A Bar.

For the purpose of official entertainment, it may be necessary to stock and set up the bar. If required to stock the bar, the SCA will always check with the host or hostess to determine preferences. The following checklists are useful in determining specific bar needs.

1. Glasses:

Since every drink requires a special glass, there are a variety of glasses used. A minimum of eight glasses by type should be stocked. The glasses should be of a style that matches the host's taste or is in keeping with the bar theme or surroundings.

2. Glassware:

Glassware is one of the most fundamental knowledge you will need to acquire while bartending. Learning about glassware means you will need to memorize the shape of the glass and its name. When you are bartending, it is critical that you pour your cocktails in the right glassware. Your customers will have expectations for a drink to come in a certain glass, and if they don't get it, they may feel ripped off. Can you imagine receiving a martini in beer mug? Or vice versa: a beer in a martini glass. It just wouldn't feel right. Figure 2 shows some of the most basic glassware that you'll need to get yourself familiar with.

- | | |
|---------------------------------|---------------|
| 1. Fluted Whiskey or Shot glass | 8. White Wine |
| 2. Cordial or Pony | 9. High Ball |
| 3. Brandy | 10. Rocks |
| 4. Red Wine | 11. Pilsner |
| 5. Martini or Cocktail | 12. Champagne |
| 6. Sherry | 13. Hurricane |
| 7. Margarita | 14. Beer Mug |



Figure 2

3. Beverages:

These items consist of, but are not limited to, liquor, wine, beer, and after dinner liqueurs. There are some basic items used at a bar. Check with the host/hostess for preferences, but it is always prudent to plan to serve:

4. Liquor:

- a. Whiskey, Rye or Canadian (example: Crown Royal, Seagram's VO).
- b. Scotch, single malt or blended (example: Glenfiddich, Chivas Regal).
- c. Bourbon (example: Makers Mark, Jack Daniels).
- d. Rum, light or dark (example: Bacardi Superior, Myers Dark Rum).
- e. Gin (example: Tanqueray, Bombay Sapphire, Beefeaters).
- f. Vodka (example: Smirnoff, Stolichnaya, Skyy, Absolute).

5. Wines:

- a. Red wine should be stored at 55 degrees Fahrenheit.
- b. Red wine should be served at room temperature.
- c. White and blush wine should be served chilled.
- d. Champagne should be chilled quickly in an ice bath; 30 minutes before service.

6. After Dinner Liqueurs:

- a. Cognac (example: Courvoisier, Remy Martin VSOP)
- b. Cordials (example: Grand Marnier, B&B (Bourbon & Benedictine), Drambuie).
- c. Other (example: Kahlua, Bailey's Irish Cream, Crème de Menthe, and Frangelico).

7. Beer:

Beer should be placed in an ice chest and iced down at least 4 hours prior to the start of the function. A selection of Light and Full Bodied Brews should be considered.

8. Non-Alcoholic Beverages - Non-alcoholic beverages consist of:

- a. Sodas- Coke, Diet Coke, Sprite, etc.
- b. Juices- Orange, grapefruit, cranberry, pineapple, and tomato.
- c. Club soda.
- d. Tonic water.
- e. Sparkling mineral water.

9. Garnishes:

Garnishes are vital to flavor and eye appeal of the drink. Generally the kinds of garnishes used are lemon and lime wedges, cocktail onions and olives for martinis, and cherries. Cut the lemon or lime in half lengthwise. Cut into ¼ -inch slices, and then cut those slices in half.

10. Maintenance and Service Items:

The following items should be available at the bar:

- a. Bar towels.
- b. Trash cans.
- c. Trash bags.
- d. Beverage napkins.
- e. Bar spoon.
- f. Measuring devices.
- g. Ice scoop.
- h. Bottle opener, corkscrew, and can opener.

11. Placement of Items:

The key to running a smooth bar operation is necessary items and their placement. The location of the bar must be taken into consideration; it should be accessible to the guests but away from the food table. It should not be so large for the room that it dominates the area.

- a. Bar centered but out of the congested area.

b. Tables

Place directly behind the bar, but leave enough walking space.

c. Glasses

(1) Wine glasses – On the top shelf inside the bar.

(2) Highball – On the second shelf inside the bar.

(3) Rocks glasses – Next to the highball glasses inside the bar.

(4) Pilsners – On the third shelf, inside the bar.

(5) Liquors, place on top of the bar, to the left or right.

d. Wine: Decant into carafes, on top of the bar opposite the liquors.

e. Beer: Place in ice chest with ice, set on table behind the bar.

f. Juices, sodas: Place one of each on top of the bar, and then place the extra supplies on the table behind the bar

g. Garnishes: Place on top the bar next to the liquors

h. Service Items: Place on top the bar, in an area where they are accessible

i. Trash cans: Place on both sides of the bar, with a tablecloth wrapped around it

j. Scoop: Place with ice.

12. Bar Equipment Checklist:

a. Cocktail shaker with top

b. Lemon-lime squeezer

c. Bottle opener

d. Stainless-steel knife

e. Corkscrew

f. Ice bucket

- g. Set of ice tongs
- h. Long handled mixing spoon
- i. Bar strainer
- j. Cutting board
- k. Large mixing picture
- l. Coasters
- m. Jigger (1 ½ ounces)
- n. Stirrers
- o. Muddler (stir sticks)
- p. Napkins

DRAFT



"Treat all your guests like they're your new boss, because they just might be"

-FSC Peter Phillips



SCA Program Motto:
"Expertly serving those few, who serve so many"

We have purpose

Our jobs allow our flag officers to “make it happen.” The more expertly we perform household management, finances, aiding our admirals with official duties and entertainment, the more time and energy our admirals have to work harder, focus, lead, negotiate and network for the Coast Guard. That is our purpose.

An SCA should be an expert as a:

Household Manager

Our management of the REFPAC’s security, maintenance, cleanliness and preservation ensures our admirals and future admirals have a place to come home to that is comfortable, safe, inviting and relaxing. Our overall management of the REPFACs allows our admirals to properly rejuvenate for the following day and keeps the management of the house out of their hands so they can work harder for the Coast Guard.

Finance and Supply Manager

Our professional knowledge of our REFPAC accounts, Coast Guard purchase methods, household funds management, inventory maintenance, contracting and proper use of representational funds builds a level of trust between the SCAs and our admirals. We properly account for, spend, receive, and document our admirals and the government’s money, and we unofficially act as COTRs for much of the REFPAC’s maintenance. Knowing their finances are in good hands gives our admirals peace of mind so they can focus more attention on the Coast Guard.

Enlisted Aide

Our attention to detail and proficiency in assisting with the care and set up of our admirals uniforms presents the Coast Guard to the world with impeccable professional bearing and military appearance. Preparing uniforms and performing tasks that aid our admirals in the performance of military responsibilities allow more time for our admirals to lead the Coast Guard.

Military Chef

Our passion for culinary excellence and service expertise displays the Coast Guard to the highest ranking government officials as professional, efficient, and talented. Many high ranking officials' only contact with the Coast Guard is through the SCAs and the work they display. To an SCA it is work, but to an outsider looking in, the visibility of our REPFACs, Commandant's Mess, DHS Executive Dining Facility and the White House is awe-inspiring. The entertainment and service we provide our admiral's guests allows work to be conducted in a relaxing, welcoming and satisfying environment. When a guest is satisfied, business and negotiations become easier for our admirals to conduct. When a guest is comfortable, friendships are formed. The power of these negotiations and friendships to the Coast Guard, in the present and in the future, is immeasurable. Providing great service to our admiral's guests allows our admirals to negotiate and network more efficiently for the Coast Guard.

This brings us to the SCA Mission Statement:

SCA Mission Statement:

“To utilize our expertise as household managers, procurement officers, enlisted aides and chefs to allow our flag corp's to lead the Coast Guard more proficiently than they would be able to on their own.”

We have purpose. Each day we arrive at the REPFAC, DHS Executive Dining Facility, Commandant's Mess, or the White House, we need strive to fulfill that purpose by “Expertly serving those few who serve so many”.

-FSC James Swenson, SCA Program Manager



SCA Program Manager REPFAC Quality Assurance Review

Representational Facility:		
Date of Review:		
Date of last Review:		
Flag Officer:		Flag Spouse:
Special Command Aide:		
Special Command Aide Program Manager:		

This checklist will be used by the Special Command Aide Program Manager during any formal Quality Assurance Review conducted at any Representational Facility.

Prior to visit:



Notify Flag Officer, Flag Spouse, Special Command Aide to schedule the review.	
Provide advance copy of checklist to SCA.	
Receive digital copy of REPFACs Continuity Book	

During the Representational Facility Review:



Meet with the Flag Officer to review the performance of the SCA and go over Continuity Book	
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Meet with the Flag Spouse	
Meet with the SCA, discuss career intentions, advancement, professional development opportunities, etc	
Discuss and review Continuity Book with SCA	
Review the SCA's daily routine, ensure routine is in compliance with CG regulations	
Review the government property inventory	
Review the REPFAC property inventory	
Review the procurement procedures (XXF, ORRF, AFC Funds, etc)	
Ensure SCA has a Government issued credit card for travel	
Note the date of the last Civil Engineering Unit inspection	
Review established work hours.	
Review the procedures used in the care and maintenance of the Flag Officer's uniform	
Review the procedures utilized for the storage of food and beverages	
Determine if the SCA is performing tasks other than official duties, if so, is compensation provided IAW CG regulations	
Conduct out brief with the SCA, Flag Officer and Flag Spouse	

After the Quality Assurance Review:

Meet with outlying units to ensure there is a positive working relationship existing between the SCA/RF and local commands. (If applicable)	
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Comments:

TJAGSA Practice Notes

The Judge Advocate General's School

(Excerpt from - The Army Lawyer DA PAM 27-50-355, August 2002)

The General Officer Aide and the Potential for Misuse

Introduction

“Rank has its privileges.” That adage has some truth, at least when it comes to the benefits conferred upon General Officers in the U.S. military. Along with respect and responsibility, promotion provides perks that are not available to lower ranking officers. When an Army officer pins on the first star, that officer also takes on additional privileges. As privileges increase, so does the potential for abuse of those privileges, and more importantly, so does the level of public scrutiny. To assist General Officers, judge advocates must understand the issues. The purpose of this note is to educate attorneys on the selection and roles of General Officer aides, identify potential areas for abuse, and assist attorneys in protecting their General Officers from allegations of unethical conduct.

The Selection of Personal Aides

The Army authorizes General Officers to have the assistance of a personal staff, to include an officer aide de camp and enlisted soldiers. The coveted aide de camp and Enlisted Aide positions bring laurels to those selected to serve a General Officer. “There are few more subjective honors in the Army than being chosen as aide de camp, the personal assistants who cater to scores of the service’s top generals.” The reason is clear. “The post is a strong indicator of success: one-third of the Army’s top generals were aides early in their careers.”

The selection of Enlisted Aides is equally subjective. Enlisted soldiers may volunteer for Enlisted Aide duty, provided they meet certain eligibility requirements. The “QM/CM Branch, Enlisted Personnel Management Branch (EPMB), HRC, nominates qualified soldiers for such positions,” and the General Officer Management Office “manages the authorizations,” but the individual General Officer often chooses his own aides.

The Role of Personal Aides

While aides de camp fulfills a more public role, Enlisted Aides are normally less visible. The sole mission of

Enlisted Aides is to assist the general in the performance of military and official duties. They are “authorized for the purpose of relieving general and flag officers of those minor tasks and details which, if performed by the officers, would be at the expense of the officers’ primary military and official duties.”

There are several limitations on Enlisted Aides’ duties, however. First, officers are prohibited by statute from using “an enlisted member of the Army as a servant.” This generally precludes requiring an Enlisted Aide to perform duties that personally benefit the officer, as opposed to duties that professionally benefit the officer. Second, the duties of Enlisted Aides must “relate to the military and official duties of the [General Officer] and thereby serve a necessary military purpose.” The language of Department of Defense Directive (DODD) 1315.9 more specifically prohibits the use of enlisted soldiers for “duties which contribute only to the officer’s personal benefit and which have no reasonable 43 connection with the officer’s official responsibilities.” Finally, the Standards of Ethical Conduct for the Executive Branch, or the *Joint Ethics Regulation (JER)*, further limit interaction between officers and their subordinates. Under the *JER*, subordinates’ official time may only be used for official duties.

The types of authorized duties that a superior may assign to an Enlisted Aide are diverse. *Army Regulation 614-200* outlines a “not all inclusive” list of “official functions” or duties, including cleaning the officer’s quarters, uniforms, and personal equipment; shopping and cooking; and running errands. Many of the enumerated duties seem personal in nature. But, “[t]he propriety of the duties is determined by the official purpose they serve, rather than the nature of the duties.” In *United States v. Robinson*, the Court of Military Appeals asserted that a different interpretation “which would apply the proscription to the kind of work done, and not to its ultimate purpose, would so circumscribe the military community that the preparation for, or the waging of, war would be impossible.” The duties assigned to an Enlisted Aide only need to have a “reasonable connection” to the military duties of the General Officer.

The General Officer himself often determines what duties his aides are to perform and whether the duties are reasonably connected to the general's official duties. Aides perform many of these assigned duties inside the officer's quarters. Consequently, little or no monitoring of the Enlisted Aides' activities occurs. Whether the duties actually are official is seldom questioned or known. Enlisted Aides would unlikely protest if the rules were bent. After all, working for the general is a privilege and the position is highly sought. Consequently, a Specialist, or even a Master Sergeant, is unlikely to tell a General Officer, "No, sir. I think that assignment crosses the ethical line." Even if the aide knows that the task is personal, rather than official, the aide may perform the assignment loyally without ever considering a complaint.

The Potential for Misuse

Aides often develop very close relationships with their General Officers. The benefits of these long-term relationships did not go unnoticed by the military, which authorizes Enlisted Aides to transfer with the general's "household." Consequently, Enlisted Aides often develop close relationships with the officer's family, as well. In such a relationship, it is not difficult to envision situations in which a General Officer assigns "unofficial" duties to or asks "favors" from an aide. The General Officer must remain mindful that he only assigns duties reasonably connected to the officer's military duties. Moreover, the General Officer must take care to avoid requesting favors. Favors conjure the concept of personal, rather than official, requests. While requested favors may include chores reasonably related to the officer's military duties, it may be more appropriate for the general to direct or order the performance of such official duties.

Favors may also require legal and ethical analysis. While an aide may voluntarily perform a favor, the nature of the aide's willingness may be an issue. Whether a Specialist could freely decline to perform a requested favor is questionable. Additionally, if in performance of the favor the aide "labors or exerts himself for the personal benefit of an officer," then the officer may be in violation of the prohibition against using a subordinate as a servant. 44

Moreover, favors may be improper for other reasons. Aides may only perform official duties during official time. To the degree that it is improper to use official time for personal purposes, it may be unethical for an aide to perform favors during duty hours. Furthermore, it follows that a supervisor may also violate ethical rules by allowing a subordinate to use official time for unofficial duties. Cognizant of the proscription against using official time for unofficial duties, an aide may volunteer to perform personal duties after duty hours.

An aide's "off-duty" performance of a "favor," however, could also be subjected to the Standards for Ethical Conduct's gift analysis. As a general rule, subordinate employees may not give gifts to superiors, and superiors may not directly or indirectly accept gifts from subordinates. Although the Standards for Ethical Conduct provide several exceptions to the general rule, these exceptions do not apply to the "gift" of services. As most people realize, time is money; people do not normally undertake responsibilities without some sort of compensation. Therefore, the time an aide spends conducting the General Officer's unofficial or personal chores could be viewed as compensable. To the extent that the aide receives no remuneration, the favor may be a gift. That an aide conducts the service secretly should not affect the analysis. Consequently, both aides and General Officers must be vigilant to ensure that aides' duties are official, rather than personal, in nature.

The aide's close relationship with and proximity to the officer's family may create other ethical problems. One particularly troublesome situation arises when an Enlisted Aide performs services for the Officers' Spouses Club when that private organization meets in the General Officer's quarters. Less obvious, but equally improper, is the use of Enlisted Aides to assist an officer's spouse with Family Readiness Groups. Despite the fact that Army regulations authorize logistical support to Family Readiness Groups, use of the General Officer's aides to assist the general's spouse with organizational chores is inappropriate. The aides' statutory duties are to assist with the General Officer's military and official duties, rather than that officer's spouse's "official" obligations.

Questions about the use of the general's aides are seldom raised. When concerns are voiced, they usually regard

an aide's activities outside the General Officer's residence. For example, the Inspector General's office may receive a telephone complaint that soldiers routinely mow the general's lawn or work in the general's vegetable garden, that someone saw the general's driver driving the general's son home from football practice, or that a visitor to the general's office saw the general's daughter's college application in the aide's typewriter. These clearly are tasks that, if performed by the officer, would be at the expense of the officer's military or official duties. But, these tasks are also highly personal in nature, and do not inherently serve a necessary military purpose. These examples illustrate the problems caused when officers assign aides tasks without a military nexus.

Discerning whether an aide's assigned duties are reasonably connected to a General Officer's military duties often meets with great difficulty. Having an aide "run" an official errand is obviously related to the officer's duties. Having that aide hand carry a General Officer's household goods shipment claim is also reasonably related to military duty. The determination becomes much more questionable when the aide's 45 duties relate to what would otherwise be considered personal matters. Cooking, cleaning, and personal errands may fall into this category. Ostensibly, if there is a nexus between grocery shopping for a General Officer and that officer's military duty, one could argue that a similar nexus exists between the same chore and a brigade commander's duties, or a battalion commander's, or a company commander's. If an enlisted soldier's completion of an officer's personal time-consuming tasks permits the officer more time to concentrate on his official duties, isn't the required nexus established? Is it permissible then for General Officers to lawfully and ethically order soldiers to complete tasks that would be unlawful or unethical if performed for a more junior officer? The answer may simply be that rank has its privileges. Both AR 614- 200 and DODD 1315.9 authorize Enlisted Aides to perform duties for General Officers that would otherwise be prohibited if performed for lower ranking officers. There is, however, an overarching principle that cannot be violated: generals' aides are to perform official, rather than personal, duties.

The line that separates "official" duties from duties that inure solely to the personal benefit of the officer, however, is often very fine. For instance, an Enlisted Aide's preparation of a meal for visiting dignitaries to consume in the general's quarters is an official duty. On the other hand, it would be inappropriate for the General Officer to order that same soldier to prepare a candlelight dinner for the General Officer and the officer's spouse. Between the two extremes lie more questionable duties, such as the preparation of a meal at which the General Officer and a subordinate will discuss "business."

Avoiding the appearance of impropriety is crucial. In short, this may be the most important issue for General Officers to remember. No reasonable officer would jeopardize their current position of respect or trade their future career for the embarrassment and minimal personal gain achieved through the misuse of subordinates. Intentional violations of the ethical rules are obvious to spot and are quick to draw unwanted public attention, but, unintentional or incidental misuse of subordinates is more likely to cause problems. In either case, the misuse of aides' time or services is unethical. Consequently, General Officers and their advisors must guard against both actual and perceived violations of the law.

Conclusion

Many questions may remain regarding the proper duties of General Officer aides. There truly is little guidance in this area, and the guidance that does exist is very "loose." Skeptics may argue that General Officers would like to keep it that way so as to maximize the privileges of rank, but the truth is that the overwhelming majority of General Officers are only interested in the full utilization of the assets or privileges lawfully afforded to them. While few detailed rules exist, detailed rules may not be necessary. Although thin, the present regulations provide sufficient guidance, while retaining sufficient flexibility for officers to mold their aides' duties to the fluid needs of the military. General Officers are entrusted to do the right thing, and previous promotions are generally proof that the officer has acted ethically and responsibly. Rank may indeed have its privileges, but it also has significant responsibilities.

FAQ'S ON USE OF COAST GUARD & OTHER RESOURCES FOR CHANGES OF COMMAND AND RETIREMENTS

I. INITIAL CONSIDERATIONS

These guidelines explain when Coast Guard money, people, and things can support changes of command (CoC), retirements, and associated receptions. In the Coast Guard, most of these events are modest; some are considerably larger. Keep in mind these considerations in all cases:

- We must be good stewards, whether ten dollars or a thousand are spent.
- Although people and things on hand can be used sometimes when money can't, diverting Coast Guardsmen and employees from their duties requires the same deliberation as spending money.
- Even when government resources can be expended, **we are all legally obliged to use only the necessary and proper resources** to achieve the authorized purpose.
- Planners for flag-level events should always consult CGJAG (i.e., your Staff Judge Advocate, Legal Service Command, or the Office of General Law (CG-0944)).

II. CHANGES OF COMMAND

1. **Can appropriated funds (OE) be used for a Change of Command (CoC) ceremony?**

Yes. A CoC is considered a traditional ceremony of the Coast Guard for which appropriated funds can be used. Appropriated funds cannot be used for Changes of Watch, except for VCG and MCPOCG. Appropriated funds can be used for non-personal expenses that are customarily incident to a CoC ceremony: government facility, utilities and equipment usage, and rental of tents, chairs, podiums, speaker systems, and tables. *See* Financial Resource Management Manual (FRMM), COMDTINST M7100.3D, Section 5.K.29; and Financial Policy for Change of Commands, 031630Z APR 07 ALCGFINANCE 007/07.

2. **Can appropriated funds (OE) be used for a CoC reception?**

No. While appropriated funds can be used to pay for non-personal expenses that are customarily incurred incident to the CoC ceremony itself, that doesn't include any reception that follows. Coast Guard policy is that all expenses related to a reception are considered personal expenses and are not payable with appropriated funds. All expenses related to any reception honoring the outgoing commander are considered personal expenses and are not payable with appropriated funds. *See* Section 5.K.29 of the FRMM and ALCGFINANCE 007/07.

Potentially, official reception and representation funds (ORRF) or Discretionary Funds – which we do not have a lot of – can be used to support an official reception for an *incoming* commander that immediately follows a CoC – when the purpose of the reception is to meet with dignitaries, local government officials, and distinguished and prominent citizens. Because using other than personal funds is contrary to Coast Guard policy, consult CGJAG if you desire to seek an exception. 69 Comp. Gen. 242. Guidelines for ORRF are in DHS MD 0540.

3. May Coast Guard personnel support a CoC reception?

It depends. Coast Guard personnel cannot "work" a reception related to a CoC as servers as part of their duties – because the reception is generally considered a private party (this is discussed more below in connection with retirements). However, the use of Coast Guard personnel who volunteer to set up simple refreshments provided by the host is permissible. When a reception for an *incoming* commander would otherwise qualify for ORRF (whether or not ORFF are spent), Coast Guard personnel can support the reception. Consult CGJAG before detailing personnel for purposes other than simple set-up.

4. May appropriated funds (OE) be used to pay for postage to mail the CoC invitations?

Yes. Appropriated funds can be used to mail out invitations and RSVP cards/envelopes to **official** military, government and industry invitees. This **official** mailing can also announce the reception, if it immediately follows the CoC ceremony. This **official** mailing can also include reception RSVP cards/envelopes, if inclusion does not increase the cost of postage - but the service member must pay the postage for RSVP cards/envelopes that are exclusively for the reception. Coast Guard prohibits affixing penalty meter or stamps to the outgoing RSVP because the rate of return is too low to justify pre-paying postage. See paragraphs 2.E.2.d.(3) and 2.F.7 of the Coast Guard Postal Manual, COMDTINST M5110.1B.

Electronic invitations are widely used today, have attained acceptance, and ought to be used to save costs. DoD's E-invitations website is a **free** service, available to the Coast Guard, and allows automatic recording of RSVP: <https://einvitations.afit.edu/>.

The service member must pay the postage for invitations, RSVP cards and envelopes sent to **family members and friends**. See paragraph 2.E.2.d.(3) of the Coast Guard Postal Manual.

5. May appropriated funds be used to print CoC programs and invitations?

Yes. CoC programs and invitations may be printed at public expense. The printed materials may also cover the retirement ceremony, if it is performed with the change of command. See Printed Matter for Official Ceremonies and Approved Stationery for Use by Flag Officers of the U.S. Coast Guard, COMDTINST 5603.1A.

6. May we contract directly with a local vendor to print our CoC programs?

No. The Coast Guard is required to procure printing services via the Government Printing Office (GPO). Contact Commandant (CG-612), attention Mr. James Roppel or Mr. Anthony Smith, (202) 375-3532, for assistance.

III. RETIREMENT CEREMONIES & RECEPTIONS

A. USE OF APPROPRIATED OR OTHER FUNDS TO SUPPORT RETIREMENT CEREMONIES

1. **How is a retirement ceremony different from a CoC?**

A CoC is a traditional ceremony transferring responsibility to a new Commanding Officer. A retirement ceremony, which expresses the Coast Guard's appreciation for many years of faithful, honorable service, has additional limitations on the use of appropriated funds.

2. **May Coast Guard property and personnel be used for a retirement ceremony?**

Yes, but only to a limited degree. While retirement is a significant event in a Coast Guardsman's life, and the customs attending it differ, its scope should be similar to ceremonies in which a personal award is bestowed. Consequently, the retiring member is permitted reasonable, appropriate, *de minimis*, use of a Coast Guard (or other government) location or facility (e.g. a room, a tent – provided it is not purchased or rented solely for the retirement ceremony), equipment and personnel (e.g. sound equipment, chairs, podium, flags, etc.). *See* 5 C.F.R. 2635.704.

3. **Can appropriated funds be expended for a retirement ceremony?**

No. As a general rule, appropriated funds, including ORRF, **cannot** be used to support a retirement ceremony even though it is an **official** event. *De minimis* use of government property and personnel described above does not involve the payment of funds. *See* Section 5.K.25 and 29 of the FRMM.

4. **What can appropriated funds (OE) be used to pay for?**

- To purchase and present an American flag. *See* 1.C.4.b.(2) Military Separations, COMDTINST M1000.4.
- To purchase and present an **official** retirement recognition award valued at less than \$335.00 or less. *See* Section 5.K.1.b.(3) of the FRMM; 1.C.4.b.(2) Military Separations, COMDTINST M1000.4.
- To purchase - and mail out - retirement ceremony invitations and RSVP cards/envelopes to **official** military, government and industry invitees. This **official** mailing **can** also note the time and location of a reception, **if** the reception immediately follows the retirement ceremony. This **official** mailing **can** also include reception RSVP cards/envelopes, **if** inclusion does not increase the cost of postage - but the retiring member must pay postage for all reception RSVP cards/envelopes. *See* paragraph 2.E.2.d.(3) of the Coast Guard Postal Manual, COMDTINST M5110.1B.

5. **Who pays the cost for stationery and postage to invite family and friends?**

The retiring member must pay for postage for retirement ceremony and reception invitations, RSVP cards and envelopes sent to family members and friends. *See* paragraph 2.E.2.d.(3) of the Coast Guard Postal Manual.

6. **Can nonappropriated funds, like Extraordinary Expense Funds (XXF) Discretionary Funds, or Morale Funds (MWR) be used for retirement ceremonies?**

No, generally. XXF and MWR funds cannot be used to support retirement ceremonies or receptions. *See* Section 6.C of the MWR Manual, COMDTINST M1710.13C.

Discretionary Funds, funded by cash gifts from the Coast Guard Foundation, are government funds and can therefore support non-personal expenses related to a retirement ceremony, but not a retirement reception.

B. USE OF APPROPRIATED OR NON-APPROPRIATED FUNDS TO SUPPORT RETIREMENT RECEPTIONS

1. **Are retirement receptions considered official events?**

No. Retirement receptions are not considered official events. They are personal, social, unofficial events and should be viewed as a private party or private social event.

2. **Can retirement receptions be supported by appropriated or non-appropriated funds?**

No. Retirement receptions cannot be supported by appropriated or non-appropriated funds. **There are no exceptions.**

3. **Can Coast Guard facilities, personnel, or equipment be used for a retirement reception?**

It depends. The Coast Guard cannot provide the use of its facilities, personnel, or equipment free of charge for a retirement reception (because it is an unofficial, private party). However, if the Coast Guard provides a facility and equipment for a retirement ceremony and the reception takes place immediately after the ceremony, the retiring officer can use the same facility and equipment for the reception at no charge – provided that there is no increased cost to the Coast Guard. However, Coast Guard personnel cannot "work" the reception as servers as part of their Coast Guard duties - because the reception is a private party. The retiring officer can hire and pay Coast Guard personnel to "work" his or her reception if the personnel volunteer for that employment and those personnel are off-duty and out of uniform when they work the reception. However, the use of Coast Guard personnel who volunteer to set up simple refreshments provided by the retiring officers is permissible.

C. OFFERS BY NON-FEDERAL SOURCES TO SUPPORT RETIREMENT CEREMONIES OR RECEPTIONS

1. Can a retiring member accept an offer by a non-federal source to support a retirement ceremony?

No, the member cannot. But the Coast Guard, only through its designated gift acceptance authorities, can accept gifts to support a retirement ceremony. Offers will be processed like any other gift offer. A member cannot solicit support. If any non-federal source makes an offer, contact your supporting CGJAG office or Mr. Bill Lucas (CG-0944). 10 U.S.C. 2601; COMDTINST 5760.14.

2. Can a retiring member accept an offer by a non-federal source to support a retirement reception?

It depends. Any offer by a non-federal source to support a retirement reception is deemed to be a personal gift offer to the retiring member. It is not deemed an offer to the Coast Guard. The same federal and Coast Guard personal gift rules apply, and, typically, will preclude acceptance. A member cannot solicit support. If any non-federal source makes an offer, contact your supporting CGJAG office or Mr. Bill Lucas (CG-0944).

See 5 C.F.R. Part 2635, Subpart B; Section 2.C of COMDTINST M5370.8B.

IV. GIFTS & MEMENTOS TO DETACHING OR RETIRING MEMBERS

A. GIFTS & MEMENTOS FROM COAST GUARD PERSONNEL

1. Can gifts & mementos from Coast Guard personnel be accepted by a member in connection with a CoC or retirement?

Yes, generally. Items with little intrinsic value, such as plaques, certificates, and trophies, are not considered gifts. Otherwise, the federal and Coast Guard individual gift rules that prohibit superiors from accepting gifts from subordinates make an exception for special, infrequent occasions that terminate their relationship, like detachment of an outgoing commander or retirement. See 5 C.F.R. Part 2635, Subpart B and C; Section 2.D of COMDTINST M5370.8B.

- a. Each subordinate can make a voluntary, individual, non-cash, retirement gift to a superior who is permitted to accept such gifts - provided the gift is appropriate to the retirement occasion. There is no dollar limit on such retirement gifts.
- b. Additionally, every subordinate can elect to contribute to a pool of money to be used to purchase one or more non-cash retirement gifts for a superior who is permitted to accept such pooled gifts. Contributions for such gifts can be solicited, but contributions must be **voluntary**. There is no dollar limit on the value of any pooled gift - but every gift must be appropriate to the occasion. As a matter of Coast Guard policy, solicitations should not request more than \$10.00 per person - but all personnel who elect to contribute can contribute as much as they want to.

B. RETIREMENT MEMENTOS & GIFTS FROM NON-FEDERAL SOURCES TO RETIRING OFFICER**Can retirement mementos or gifts be accepted from non-federal sources?**

1. Mementos with little intrinsic value (see above): yes. Gifts: generally, no. Contact your supporting CGJAG office or Bill Lucas in CG-0944 for further guidance. *See* 5 C.F.R. Part 2635, Subpart B and Section 2.C of COMDTINST 5370.8B.

V. TRAVELLING TO COC, COW, & RETIREMENT CEREMONIES**1. Does an invitation to a CoC or CoW justify official travel to attend?**

No. An invitation to a CoC or CoW does not justify official travel, and travel of invitees is generally at their own expense. There are a couple of exceptions:

- Those with an **official role** in the ceremony can travel at government expense.
- A **subordinate** of the incoming commander may possibly attend a CoC ceremony on funded orders even if not otherwise actually participating, but the incoming commander should provide clear guidance to minimize unnecessary expense. Attendance by a subordinate (usually a commander of a sub-element within the direct chain of command) to witness the assumption of command and publication of orders is an official duty that reinforces the significance and solemnity of the occasion, reinforces the chain of command, contributes to good order and discipline, and ensures that the new commander's guidance to the command is promptly and accurately disseminated. Examples: travel of District Commanders to Area CoC; travel of subordinates in the rating chain of VCG or MCPOCG to a CoW. This doesn't justify sending a delegation to attend a distant ceremony. *See* FRMM 5.K.29; JTR (Chapter 4, Part A, C4410); JFTR (Chapter 7, Part S, U7650); Coast Guard Supplement to the JFTR, COMDTINST M4600.17 (Chapter 2); VCG 4600 Memo dtd 2 March 2011.

2. Does an invitation to a retirement justify official travel to attend?

No. An invitation to a retirement does not justify official travel, and travel of invitees is generally at their own expense. The exception is that those with an **official role** in the ceremony can travel on funded orders. A chain of command or other relationship of the invitee to the person retiring doesn't matter. *See* FRMM 5.K.29; JFTR (Chapter 7, Part S, U7650); Coast Guard Supplement to the JFTR, COMDTINST M4600.17 (Chapter 2); VCG 4600 Memo dtd 2 March 2011.

3. **What qualifies as an official role in a ceremony?**

Participants with an official role in a ceremony are those who preside at the ceremony, participate in a unit formation, give a speech, or present an award, which justifies funding their travel. Presenting formal or informal recognition to the departing or retiring member, or spouse, on behalf of the Coast Guard, a unit, or a discernible group of persons related to the Coast Guard qualifies. JFTR, U2200; 031630Z APR 07 ALCGFINANCE 07/07.

4. **Can somebody otherwise on TAD attend a CoC, CoW, or retirement?**

Yes, provided the TAD is legitimate, the ceremony is occurring at the same location as the TAD site, and attendance does not add to the expense of TAD.

5. **Can a person attend a CoC, CoW, or retirement in any other status other than leave?**

Yes, administrative absence may be approved for members to attend these ceremonies when official travel is inappropriate. Civilians may be granted administrative leave.

VI. **SPECIAL COMMAND AIDES (SCA)**

1. **Can SCAs provide official support to a CoC or retirement reception?**

It depends. SCAs support **official** social and non-social events, typically in the assigned REPFAC. That means they can support receptions for an *incoming commander* that are not intended or appear to be of a personal character (e.g., hosting interagency or local dignitaries, or subordinate staff and commanders). The SCA can support a reception held outside the REPFAC that meets this standard. If it meets the standard, the SCA can help plan the event, procure food and beverages, and prepare and serve the food and beverages. See COMDTINST 5300.9B.

2. **May SCAs provide unofficial support?**

Yes. Flag officers are permitted to hire their SCA to perform personal, unofficial services as a form of off-duty employment, if the SCA **volunteers** to provide the personal service (e.g. to work a private, unofficial, reception or dinner) **and** the flag officer properly **compensates** the SCA.

3. **What are some factors to consider in determining whether SCAs may be used to support social events in an official capacity?**

Flag officers may use SCAs to support **official** social functions that are reasonably connected to the flag officer's official duties and responsibilities. Some factors to consider in determining whether use of an SCA is proper to support an **official** social function are as follows (please note that not all the factors need to be present, nor should any single factor alone be conclusive):

- a. The primary focus of the event is the transaction of **official** business.
- b. The event is intended to improve moral, promote *esprit de corps*, and develop interpersonal relationships among command members and their families.
- c. Dignitaries, civic/community leaders, or senior service personnel attend as **official** invitees.
- d. Personnel attend in uniform.
- e. The flag officer considers it part of his/her duties to host the official social function.
- f. The event is held at the flag officer's public quarters or other government location.
- g. No fee is charged for attendance.

DRAFT

Template - SCA Package

U.S. Department of
Homeland Security



United States
Coast Guard

Commanding Officer
USCGC UNDERWAY (WMEC-654)

2100 Coast Guard Way
Inport, FL 32920
Staff Symbol:
Phone: (202) xxx-xxxx
Fax: (202) xxx-xxxx

1326

MEMORANDUM

From: I.R. Cooke, FS1
USCGC UNDERWAY (WMEC- 456)

Reply to
Attn of: FS1 I.R. Cooke
(202) xxx-xxxx

To: CGPSC-EPM-2

Thru: CO/OINC

Subj: REQUEST ASSIGNMENT TO THE SPECIAL COMMAND AIDE PROGRAM

Ref: (a) ALCGENL xx/xx SOLICITATION FOR AY12

1. As announced in Reference (a), I respectfully request to be selected as a Special Command Aide.
2. My number one reason for requesting this appointment is because I am passionate about being a food service specialist. I have loved all my Coast Guard assignments to date and I am enthusiastic about expanding my culinary knowledge and increasing my skills at providing the best service possible. To be a Special Command Aide is the epitome of what I strive for – service at the highest level, to bring great credit to the Coast Guard through my rate and specialty, to continue to challenge and expand my leadership and then train and develop others to have the same passion for my rate as I do. I love to be challenged in new and rewarding ways. One of my aims as a supervisor is to be as well rounded as possible in my experiences and knowledge so that I can better guide and mentor others. Each person I will encounter during my tour will have something to teach me, whether it be culinary skills, service skills or leadership skills. Learning and fine tuning is one of the things I enjoy the most. I would like to complete a tour as a Special Command Aide and have an opportunity to bring the new things I have learned back into the field.
3. It gives me a great sense of accomplishment to put on catered events from buffet style to full plate service. It is a chance to be creative and really put some personality into my work. At Air Station Miami, I most enjoyed being the Baker and being in charge of planning and putting on high visibility meals. During my tenure, I gained experience in providing service to include visits from a Brigadier General, Admirals, social events, public affairs meetings with our Commanding Officer and many retirements. I think one of the reasons I enjoy these jobs so much is because I get a chance to cook a wide variety of meals and put special touches on each.
4. I was told recently by a fellow shipmate that I have a “service heart”. To me that is quite a complement. I enjoy giving my customers exactly what they want, when they want it, and how they want it. I love knowing what makes my boss happy. I know that sounds weird, but making my boss happy makes me happy. I know that the job of an SCA isn’t always glamorous. There are dishes to be washed, uniforms to be prepared, bathrooms to be cleaned, rooms and grounds to be maintained. While some aspects of the job may be tedious, I will approach them all with the same care and thought that I would show to a formal dinner. I always keep in mind that everything

about my job is to make my Admiral's job easier. To me, that gets to the very heart of good service and having a "heart for service": the selfless desire to help someone else. Why is this important? Whether it is providing a how bowl of soup to a fellow Coast Guardsman, or carrying the Admirals briefcase upstairs because he had a long day. Great service has a ripple effect; it can positively affect everyone around you.

I would be honored to have the opportunity to serve as a Special Command Aide. It would be especially rewarding for me to enhance the reputation of our service through my work. Thank you!

#

DRAFT

U.S. Department of
Homeland Security



United States
Coast Guard

Commanding Officer
USCGC UNDERWAY (WMEC-654)

2100 Coast Guard Way
Inport, FL 32920
Staff Symbol:
Phone: (202) xxx-xxxx
Fax: (202) xxx-xxxx

1326

MEMORANDUM

From: I.R. Cooke, FS1
USCGC UNDERWAY (WMEC- 456)

Reply to
Attn of: FS1 I.R. Cooke
(202) xxx-xxxx

To: CGPSC-EPM-2

Thru: CO/OINC

Subj: REQUEST ASSIGNMENT TO THE SPECIAL COMMAND AIDE PROGRAM

Ref: (b) ALCGENL xx/xx SOLICITATION FOR AY12

1. This request is forwarded, highly recommending FS1 Cooke for consideration to a Special Command Aide (SCA) assignment. FS1 Cooke has shown the characteristic traits and dedication to succeed in the challenging, high-profile environment offered by this caliber of assignment.
2. Eligibility. FS1 Cooke meets all eligibility requirements outlined in ALCGENL 163/11. He will attain the required 2 years of sea service on 12May2012, which is prior to his anticipated departure date. He has a current Secret clearance, with an effective date of 01Aug06. He consistently presents a sharp military appearance.
3. Summary of Character. FS1 Cooke has shown himself to be very personally invested in the quality of his work. He takes an immense amount of pride in providing meals with innovative and creative flavor profiles. He has volunteered his talents as a Spanish translator and has often worked well outside of his job description to assist the unit during AMIO operations or other demanding evolutions. Despite working the arduous hours of a Key West 87' WPB, FS1 Cooke has always maintained an upbeat and friendly demeanor and has always put forth an exceptional effort into providing the best quality of meals for the crew.
4. Personal Appearance and Military Bearing. FS1 Cooke has consistently shown a fine example in his uniform appearance and military bearing. His uniforms are consistently well-kept and he maintains his personal grooming well beyond the standard requirements. He embodies a character of professionalism during his interactions and maintains a very comfortable balance of military professionalism and personal-level interaction with his shipmates and supervisors.
5. Professionalism, Comfort and Ability to Interact with Senior Officials. After review of FS1 Cooke ' career history and resume, he has had considerable experience in planning, coordinating and executing receptions for official functions. He has always embraced the challenges of these opportunities and has met with high praise for the quality of his work. He consistently maintains a pronounced, professional demeanor and also interacts very comfortably and personably with senior government officials or military members.

6. Financial Accountability. FS1 Cooke does an excellent job in managing the finances and funding allocated to CGC UNDERWAY's CGDF. He projects funding out over the long-term and is able to schedule meals to ensure both a high quality meal for the crew and ensure that funding is expended responsibly. He rarely accumulates a deficit in his monthly accounting and is always well within his allocated monthly spending tolerances.

7. Culinary and Other Professional Qualifications. As mentioned above, FS1 Cooke has shown the drive and initiative to excel in an assignment as a Special Command Aide. He has been an integral member of the crew and has made a very personal investment in taking care of them to the best of his ability. The culinary intuition and innovation put forth into his meals is a testament to his profession and the pride he takes in his work. Given the limited storage and culinary equipment available on the 87' WPB, I have never failed to be impressed with the quality of product that FS1 Cooke has been able to produce. He truly embodies the Coast Guard's Core Values and is a fine example of his rating. Given some additional specialty training and a fully-equipped facility, I have every confidence that FS1 Cooke will excel beyond the expectations of his principal.

8. I am available by phone at (505) 747-2998 or by email at greg.r.zerfess@uscg.mil to address any questions regarding this endorsement.

#

U.S. Department of
Homeland Security

United States
Coast Guard



Commanding Officer
USCGC UNDERWAY (WMEC-654)

9235 Coast Guard Way
Inport, FL xxxxx
Staff Symbol:
Phone: (202) xxx-xxxx
Fax: (202) xxx-xxxx

MEMORANDUM

From: FS1 I.R. Cooke

Reply to FS1 I.R. Cooke
Attn of:

To: CGPSC-EPM-2

Thru: CO/OINC

Subj: REQUEST ASSIGNMENT TO THE SPECIAL COMMAND AIDE PROGRAM

Ref: (a) ALCOAST ###/### SOLICITATION FOR AY12

1. In reverse chronological order listed below is a historical summary of units along with primary and collateral duties assumed at each.

June 2007 to June 2009: **USCGC Underway (WMEC- 456) Port Canaveral, FL**

Primary duties: Senior Food Service Petty Officer, Galley Supervisor, Food Services Officer.

Collateral duties: Galley Training Petty Officer, Supervised three Food Service Specialists of varying ranks as well as three non rates, Messdeck and Galley Master at Arms, Assistance Master at Arms, Jack of the Dust, Duty Cook, Migrant Watch Stander, Attack Team Leader, Damage Control Plotter, Boarding Team Member, Movie Locker Custodian.

June 2003 to June 2007: **USCG Air Station Miami, FL**

Primary duties: Senior Food Service Petty Officer, Galley Supervisor.

Collateral Duties: Galley Training Petty Officer, Supervised five Food Service Specialists of varying ranks as well as six contract workers, Messdeck Master at Arms, Jack of the Dust, Duty Cook, Galley Watch Captain.

June 2001 to June 2003: **USCGC Underwater (WMEC – 457)**

Primary duties: Food Service Specialist/Duty Cook.

Collateral duties: Messdeck, Chief's Mess, and Wardroom Master at Arms; Galley Watch Captain; Damage Control Petty Officer; Migrant Watchstander; Battle Dressing Station stretcher bearer; Helicopter Fire team Nozzleman.

March 2001 to June 2001: **USCG Training Center Petaluma, CA**

Primary duties: Food Service Specialist Class "A" School

Collateral duties: Class Leader, Honor Student.

July 2000 to March 2001: **USCGC Underrain (WPB – 87456) Carrabelle, FL**

Primary duties: Fireman.

Collateral duties: Damage Control Petty Officer, Underway Engineer of the Watch, In Port Officer of the Day, Boarding Team Member.

May 2000 to July 2000: **USCG Group St. Petersburg, FL**

Primary duties: Fireman.

Collateral duties: Facilities Maintenance (Awaiting orders to the SEAHAWK).

September 1999 to May 2000: **USCGC Point Underway (WPB – 654) CLEARWATER, FL**

Primary duties: Fireman Apprentice.

Collateral duties: Damage Control Petty Officer, Underway Engineer of the Watch, In Port Officer of the Day, Boarding Team Member.

July 1999 to September 1999: **USCG Training Center Cape May, NJ**

2. The following is a summary of major professional accomplishments including personal medals and awards:

Three Coast Guard Achievement Medals with “O” device, three Coast Guard Meritorious Team Commendation Awards with “O” device, three Coast Guard Good Conduct Medals, one Coast Guard Sea Service Ribbon, 2008 USCGC VIGILANT’S Sailor of the Quarter, 2005 USCG Air Station Miami’s Enlisted Person of the Quarter, 2001 USCGC RESOLUTE’S Sailor of the Quarter, 2001 Food Service “A” School Honor Graduate.

3. The Following is a summary of my education and training history:

Completed two culinary Continuing Education classes at the Culinary Institute of America, Garde Manger and Mediterranean Cuisine; Graduated from the Army’s Advanced Culinary Skills course at Fort Lee, Virginia; Serve Safe Certified in 2005 and registered as a Proctor; Graduated from the Coast Guard Boarding Team Member course at FLETC in Charleston, VA; Completed the Coast Guard Leadership and Management Course; Completed 24 traditional College Credits at Duquesne University in Pittsburgh, PA.

4. The following is a summary of my culinary presentation experience:

a. Acting FSO on Underway while our Chief was attending the CPO Academy. During this time we were underway and attending tailored annual cutter training (TACT) during two hurricane evasions.

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b. Hosted several high visibility events including a luncheon for the Governor of Turks and Caicos, the U.S. Ambassador to the Bahamas, and the District Seventeen Commander.

c. Put together Underway’s Change of Command serving 100 guests.

At Air Station Miami I oversaw a Galley renovation project demolishing the interior of our entire building. Instead of contracting food, setting up a mobile galley or sending our patrons to commercial sources with higher prices I devised a plan to allow us to convert an unused Bar area into a temporary

- d. Galley. I planned menus to work off propane burners and BBQs. This allowed our patrons to continue to enjoy the same service and convenience that they were accustomed to and prevented increased cost to them.
- e. As a second class Petty Officer I was appointed as the Galley Supervisor, a position normally held by a first class Petty Officer. I was recognized for my exceptional paperwork management, inventory control, accounting, and leadership.
- f. Planned a Change of Command for over 400 guests including other Law Enforcement agencies and the District Seven Commander. I was recognized for my fruit carvings, presentation as well as for providing a meal above expectations.
- g. Hosted many events, some last minute, to include a visit from a Brigadier General for a luncheon and retirement ceremonies from all surrounding units. I was recognized for excellent service for every event.
- h. Serv-Safe qualified and registered myself as a proctor/instructor.
- i. Worked with the D7 Special Command Aide during a Christmas party and a few other special events for which we provided formal party service. My Command and I received letters from the Admiral thanking me for my professionalism.
- j. At the Air Station, I was also the Baker; making four to five desserts a night. Each dessert was made up into individual servings. All desserts were made from scratch and they were highly accepted.
- k. On RESOLUTE we hosted a Thanksgiving dinner underway for the Secretary of Transportation and the Vice Commandant. I was recognized for providing a superb feast with a variety of desserts and watermelon carvings.
- l. Put together RESOLUTE's Chang of Command ceremony as well as the retirements for both the FSC and FS1.

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Template - Daily Communication Log

Daily items:

DATE:

End of the week cleanups
 Cleaned gazebo and patio furniture and areas
 Water lawn, flowers/plants, beds, & trees (filled up water bags for trees)
 Pulled weeds
 Cleaned Spider webs
 Went to home depot and bought garden supplies and tomato, jalapeño, and herb plants
 Transplanted plants and watering
 Brought in mail (on counter)
 Made Salsa for weekend

Daily items to complete next workday:

Daily Clean ups
 Water lawn
 Purchase linens

Current Projects (Project/Status/Contractor Name, Due Date):

Kitchen Cabinet drawer replacement scheduled for Tuesday, June 14th at 0900 a.m.

Up Coming Events:

June 14 - Dinner for Senator Clayfield

Notes:

Good Evening Admiral,

Attached is the Business Case Analysis for the chandelier requested for FY12. This is required for any item over \$1000 on the proposed Spend Plan. Could you please review and sign at your convenience? I made a salsa for you to have over the weekend; it's a little spicy. Have a great weekend, sir/ma'am.

V/R
FS1 Chef

Reminders of absence:

- June 2-5 Leave

FS1 Chef - (401) 378-6750

Telephone Messages:

REPFAC Visitors:



Template - Weekly Work Check-List

Representational Facility:	
Date Beginning of Week:	

Weekly Items:



Day of the week:	M	T	W	T	F
Countertops - clean under all items					
Exteriors of appliances wiped down weekly					
Sweep Utility Rooms					
Polish Stainless steel in kitchen					
Clean all glass furniture (ex: coffee tables)					
Vacuum Carpets/area rugs					
Clean hardwood floors with hardwood floor cleaner					
Pull weeds from garden area					
Dust all furniture/picture frames					
Clean patio and gazebo					
Wipe down kitchen Cabinets					
Dust ceiling fan blades					
Clean Laundry space and mop sink					
Fill tree bags with water					
Clean out microwave					
Clean SCA bathroom					
Clean Guest Bathroom					
Mow lawn					
Edge lawn and garden areas					
Blow down/Rake leaves and place into the proper receptacle					
Iron uniforms (as necessary)					
Polish Shoes or boots (as necessary)					
Wipe Down Light Fixtures & Ceiling Fans					
Run Generator for at least 20 minutes					



(Insert REPFAC) Monthly Check-List - (2012)

Monthly Items:

Month:	J	F	M	A	M	J	J	A	S	O	N	D
Polish Display Silver												
Wipe doors and door frames for marks												
Clean ovens												
Clean kitchen exhaust hood												
Wash windows - clean glass & sills monthly												
Cabinetry - repair scratches & holes as needed												
Utility Room - Change Furnace Filter Sort storage items												
Patios, Decks & Walks - weed; repair and remove oil spots												
Utility Room - Wipe down appliances												
Vacuum Carpet Edges												

Quarterly Items:

Fill In Date:	Last completed	Completed
Change air filters		
Clean ice maker		
Clean Freezer		
Check ice maker filtration system		
Check water supply filtration system		
Move kitchen appliances and clean floor and wall behind them		
Doors and Frames wipe down or oil and tighten hardware		
Clean Window Tracks		
Wipe Down All Walls		

Every 6 Months Items:

Fill In Date:	Last completed	Completed
Steam Clean Carpets		
Wash Ceiling Fans		
Organize Shed		
Clean Gutters		



Template - REPFAC Continuity Book

Representational Facility:		
Date of Last Update:		
Date of last Review:		
Flag Officer:		Flag Spouse:
Special Command Aide:		
Special Command Aide Program Manager:		

- b. PURPOSE. The Continuity Book provides direction for the (Insert REPFAC) Special Command Aide (SCA) position and the management OF the Representational Facility (REPFAC).
- c. DISCUSSION.
- a. The position of (Flag Officer Title) includes an enlisted SCA to properly manage and maintain the REPFAC and assist in the handling of various social responsibilities which are inherent to the (Flag Officer Title).
 - b. The REPFAC program exists to highlight the Coast Guard to external, non-Coast Guard audiences of political, diplomatic and regional or national importance, and to serve as a residence for the Special Command Position – in this case, the (Flag Officer Title). The REPFAC is a federal facility and therefore held to a high standard of cleanliness, organization, stewardship, security, and accountability.
- d. PROCEDURES.
- a. **SCA Duties and Responsibilities.**

- (1) Perform duties necessary for the upkeep and maintenance of the REPFAC, including the procurement and storage of equipment and supplies. This includes, but is not limited to: lawn maintenance (to the extent which is not covered by a landscaping contract); snow removal (areas not covered by a snow plowing contract); sweeping/debris removal; washing windows; maintaining floors and carpets; regular top-down cleaning of all public rooms and bathrooms on the representational level; and maintaining government-owned property, silverware, china and kitchen equipment.
- (2) Serve as the point of contact for the REPFAC for all Coast Guard related business and outside contractors. Schedule and oversee all Coast Guard and contracted work at the REPFAC.
- (3) Assist in coordinating official functions at the REPFAC, including spouse's club events. Oversee/execute venue readiness and setup, menu formation, food/beverage procurement, food preparation and cleanup, staff training and direction.
- (4) Prepare and serve official lunches and other functions hosted by (Flag Officer Title) at the Office or other potential off-site locations.
- (5) Maintain a comprehensive inventory of all government-owned items at the REPFAC.
- (6) Assist with the care, maintenance and cleanliness of uniforms and personal military equipment, as directed by (Flag Officer Title). This may include regular assistance with dry cleaning.
- (7) Maintain administrative reports and documents. This includes, but is not limited to: petty cash ledger; invoices, receipts and menus for all official functions; scopes of work and contractor invoices, procurement accounting and files, and weekly work reports.
- (8) Other duties, as directed by the (Flag Officer Title).
- (9) The SCA is not responsible for duties that contribute solely to the personal benefit of the (Flag Officer Title) or have no reasonable connection with his/her official duties.

b. Supervision and Command Staff.

- (1) The SCA is ultimately accountable to the (Flag Officer Title) and serves his or her needs. Due to the unique nature of the SCA position and the various responsibilities associated with it, the SCA also works closely with, and may receive specific direction from, the admiral's aide and the spouse. In terms of military protocol, the chain of command is clear. However, depending on how the (Flag Officer Title) chooses to organize his or her staff, the SCA may interact with the Aide, with the spouse or another individual. The SCA must be mindful of this dynamic and flexible enough to interact within all organizations of supervision.
- (2) The SCA is not responsible for duties that contribute solely to the personal benefit of the (Flag Officer Title). or have no reasonable connection with his/her official duties.

- (3) The Command Master Chief (CMC) is the SCA's primary point of enlisted contact and serves as his/her resource for all matters pertaining to work issues or matters not resolvable at the unit level. The CMC will also serve to review the SCA's Individual Development Plan (IDP) and provide enlisted-specific career and advancement counseling.
- (4) The Special Command Aide Program Manager is the program administrator for the SCA program and is the Subject Matter Specialist for all program-specific concerns. If there are questions related to SCA duties and responsibilities he/she will be the primary point of contact. It is important to note that all matters of workplace dispute should be handled through the SCA's local chain of command first (CMC and Aide).

c. Other (Flag Officer Title) Staff.

- (1) The Admiral's Administrative Assistant manages the (Flag Officer Title)'s office functions at the Federal Building. She/he can be a resource for Unit-specific items. The Admin. Assistant also manages the (Flag Officer Title)s official discretionary and XXF accounts. Any accounting related to expenditures on these accounts will be reported to her/him.

d. Uniforms.

- (1) The SCA is authorized to wear suitable business casual civilian attire during normal work days at the REPFAC. This uniform includes black slacks and a 2-3 button blue polo shirt with (Flag Officer Title) logo (available at local CGX). Funding for purchase of these uniforms is available through fiscal year (FY) REPFAC appropriated funds although the care and maintenance is the responsibility of the SCA.
- (2) When performing food service functions for an official event, the SCA will wear the standard FS uniform, to include white chef's coat, black chef's pants.
- (3) An inventory of standard food service uniforms in varying sizes is kept at the REPFAC and may be purchased with REPFAC appropriated funds IAW associated directives. These uniforms are for the use of the SCA and any staff that may be employed during official functions. The uniforms are the property of the unit and the care and maintenance are the responsibility of the SCA.
- (4) Given the nature of the position, the SCA is required to maintain suitable work clothing for work outside and in cold or inclement weather conditions. These items include warm and insulated outerwear, hats, gloves and boots. Procurement of items in addition to issued sea bag items is the sole responsibility of the SCA. The items may be stored at the REPFAC and must be kept clean and orderly when not in use.
- (5) When attending Coast Guard functions in a non-food service capacity at the Federal Building or elsewhere, the prescribed uniform will be the uniform of the day unless otherwise directed.

e. Unique Conditions.

- (1) The (Flag Officer Title)'s spouse, though likely a civilian, is an important component to a healthy working environment at the REPFAC. The spouse may choose to have little or great involvement in the operation of the REPFAC and associated planning and decision-making. It is the role of the SCA to engage the spouse as to his/her specific expectations. Within the constructs of the program and related directives, the SCA will manage the needs of the spouse as a direct extension of the (Flag Officer Title)'s own needs. Official communication may or may not go through the spouse, as specified by the (Flag Officer Title).
- (2) The REPFAC is at once an official federal facility and a private residence. Care must be taken with all that this implies. The SCA must recognize that she/he will often be privy to information of a private and/or sensitive nature and unique family dynamics. The SCA will treat her/his unique knowledge with the same care and discretion as if she/he were managing sensitive, official information.
- (3) When seeking to schedule or perform work in the REPFAC, even within the representational spaces, the SCA must confirm that the work will not disrupt the lives of the residents in any way. If work is likely to be disruptive or access to private living areas is needed, the SCA will secure approval from the residents before initiating the project.
- (4) Open lines of communication are essential to the health of the SCA/family relationship no matter what level of involvement the spouse has on a daily basis. Communication must be sought at all times in many fashions including the Daily Communication Log. It is important to engage the residents for their opinion on any REPFAC matters before procuring goods or initiating projects/contracts.
- (5) The residents may occasionally choose to display or use some of their personal items or furniture within the representational areas of the REPFAC. When this happens, the care and maintenance of these items becomes the responsibility of the SCA, unless otherwise directed. The SCA will engage the residents to ensure that proper methods of care are being used. The same policy holds true for any plant life or flowers that may be displayed.

f. **REPFAC-General.**

- (1) The address to the REPFAC is
 - (a) U.S. Coast Guard
(Flag Officer Title) Representational Facility
123456 Coastal Drive
Lakeville, DF 44034
- (2) There are currently two, official phone numbers associated with the REPFAC which are paid for appropriated funds:
 - (a) SCA Office Phone: (453) 252-4544
 - (b) Residential Line: (452) 252-4544

- (3) Residents may elect to install their own, private phone and internet lines at personal cost. It is advisable that you know all numbers to lines going into the REPFAC, but the payment and maintenance of the accounts is the responsibility of the residents. As the primary point of contact for the REPFAC, you may be asked to field phone calls from the private lines and deliver messages to the residents. Proper phone protocol is to be used on any line in the quarters. Private lines are for residential use only. The SCA should not divulge private phone numbers to anyone nor use them as points of contact or avenues of official business.
- (4) The REPFAC is located on a private portion of Smallboat Drive which extends to the east, from Large Brick Avenue. There are three other residences which share access to this drive. The drive is paved with gravel and is maintained by all the residences on a rotating basis. Grading and laying of gravel is an AFC-30 project undertaken periodically by the Coast Guard.
- (5) A parking spot for the SCA is located at the end of the gravel drive, indicated by two, large trees. The SCA should seek to park his/her POV in this area when permissible. During times (heavy snow/rain) when the spot is inaccessible, the SCA may utilize the REPFAC driveway to the extent which it does not hinder foot traffic on the sidewalks or the ability of the residents or guests to use the driveway or garage. Similarly, when received contractors, the SCA should ensure that their vehicles do not hinder traffic on the driveway, sidewalk or common drive.
- (6) The REPFAC property is marked clearly by a line of fence on the south side, which extends, following the fence line to the North, on both the east and west sides of the property. The property line ends at the sidewalk on the south side. The care of the sidewalk within those lines is the responsibility of the Coast Guard. The tree lawn to the south of the sidewalk is property of the residence to the south of the REPFAC. Though not Coast Guard property, the maintenance of the lawn is undertaken by the SCA to the extent which it is not contracted. Any contracted work to this portion of lawn is the responsibility of the neighboring resident.
- (7) Respect for the needs of the neighbors is to be considered at all times when work or activities may affect them. Care should be taken to notify the neighbors of any work which may block the common drive, create unusual noise or any other factor which may impact them.
- (8) The REPFAC key log is maintained by the AHO at the Federal Building. A REPFAC key can gain access to all exterior door locks and deadbolts at the REPFAC. It is extremely important that the keys are kept safe and accounted for at all times. Keys are issued to each of the residents, to the Aide and to the SCA. Each issuance is logged out and in when the member or residents departs PCS. Keys are never to be issued to any person not approved by the AHO or resident. If a key becomes lost, it is vital to notify the AHO and SCA immediately so steps can be taken to secure the property.

g. **REPFAC- Exterior.**

- (1) The care and upkeep of the exterior gardens and grounds is the responsibility of the SCA including mowing the grass, trimming the hedges and watering the yard. Constant checks need to be made to the exterior of the quarters to ensure that the quarters are in sound condition; maintain lighting, and check the roofing shingles. Another problem can be bug, bird and rodent (squirrels & rabbits) infestations. Excessive weed growth throughout the lawn needs to be reported to XXXX at extension (123) 685-3205 so that they can treat the lawn, sidewalks and flower beds.
- (2) Large elements of exterior care are contracted by outside contractors. The maintenance and execution of these contracts is the responsibility of FE.
- (3) A lawn care service is currently contracted to apply fertilizers and herbicides to the lawn, to aerate when needed and to monitor the health of the lawn and grounds. Weekly trimming remains the responsibility of the SCA. Seasonal cleanups (removal of debris, etc.) and the spreading of mulch are also typically contracted as well as the installation of new plant life.
- (4) The purchase and planting of perennial plants may be paid with AFC-30 funds. However, the purchase of any annual plants and flowers is not authorized through appropriated funds. The residents may wish to purchase and plants annuals using their personal funds and will typically request that the SCA assist with this task.
- (5) Sweep front porch and walkway as needed, pigeons regularly make the awning of the porch a roosting place so clean up as required.
- (6) When time permits, weeding and “dead heading” needs to be completed on the flower beds. This can be accomplished personally or by contacting Bruce Murdock of Roads and Grounds at (123) 696-3809. The REPFAC falls within USDA Plant Hardiness Zone 5b. When installing any new plant life, it is recommended that the SCA familiarize him/herself with flora that can thrive within this zone. Contacting a local gardening center is also advisable.
- (7) As per City of Lakewood directive, grass clippings and leaves which are to be disposed of should be stored in paper lawn/leaf bags. Yard debris such as sticks and branches should be broken into manageable lengths and bound together in manageable bundles for disposal. Each should be set out weekly with trash and recycling.
- (8) Trash and recycling is to be set out on Thursday evening. Recycling is mandatory in the City of Lakewood. Plastics and cans should be stored in blue recycling bags. All paper should be placed in manageable stacks and bound with twine for carry. Trash should be stowed in the approved, green container and placed with the front facing the street. The lid of the trash bin must close completely. Holidays affect the trash schedule. Please consult the City of Lakewood, Division of Refuse webpage for current listings of Holiday trash schedules.
- (9) The removal of snow from the common drive and the REPFAC driveway is contracted. The clearing of all walks and patios remains the responsibility of the SCA. Care should be taken to maintain the contract and to notify the contractor if weekend or multiple daily plows are

needed. Stakes should be planted before first snowfall to clearly mark all walkway and driveway borders.

- (10) During the coldest months, ice buildup can occur. Daily inspection of the roof's edge is necessary to ensure that there are no icicles hanging from the eaves that are a danger. The use of calcium chloride is the most expedient method to soften and remove ice from the walks and drives. Care should be taken to have enough on hand for the winter months. The SCA should familiarize him/herself with the proper use of calcium chloride on all surfaces and managing thaw-freeze cycles before use.
- (11) Watering of lawn and grounds is performed manually and with hose-end sprinklers. Watering should occur frequently throughout the week and be performed in the early morning or late evening. Consult the lawn care contractor if any discrepancies or areas of concern arise with the lawn or plant life.
- (12) The tool shed to the east of the REPFAC serves as storage for all exterior maintenance equipment and tools. It is also the location of the flammable/hazardous materials locker. All HAZMAT, fertilizer, paint, fuel, etc. shall be stored in this locker. The shed is also the winter storage facility for the issued patio furniture as well as any private property the residents wish to store.
- (13) The gas grill issued to the REPFAC is fitted to a hard-line gas supply extending from the north-side of the house, on the back patio. When the grill is not in use or in storage, ensure that the valve to gas line is closed and that both fitting ends (grill and wall) are covered.
- (14) The garage is exclusively for the use of the residents. The SCA should not expect the ability to park or store anything inside unless otherwise arranged with the residents. An aluminum extension ladder hanging from the overhead is the only piece of official property in the garage.

h. REPFAC- Interior.

- (1) When any situation arises where maintenance is needed the first step is to determine if it can be done personally or if a professional is needed. If professional help is needed, then you must contact Base FE during the day and Base OOD after hours (123) 456-7890.
- (2) The REPFAC is divided generally into two areas. The first floor is the "representational area". The upkeep and maintenance of this area is the daily responsibility of the SCA. This includes the staircase leading to the upper floors. Upon arriving at REPFAC the outside lights needs to be turned off, and the newspaper needs to be brought in.
- (3) The kitchen area is both residential and representational in nature. For this reason care should be taken when working in the kitchen to be mindful of the needs of the residents. Though the kitchen is most often used in a residential capacity, its cleanliness and the cleanliness of all cabinets and appliances is strictly the responsibility of the SCA. After start of the day clean ups and dinner was requested for the night, it is time for planning and preparation of the dinner meal. If all the goods are in house, you may prepare the evening meal and put it in the refrigerator to be re-heated later. At this time it may be necessary to

start lunch for the Admiral, if requested, and/or begin cleaning elsewhere in the house. The kitchen routine is closed up with wiping down the stove, refrigerator and all counters, emptying the trash, and washing, drying and putting away the dishes and finished off by sweeping and mopping the floor.

- (4) Foyer, dining room and living room - Dusting the woodwork with Pledge, polishing the silver and brass, vacuuming and general tidying needs to be done two to three times a week or as determined by social events. The crystal chandeliers need to be shined, one crystal at a time, with a combination of Windex and dry paper towels, drying them being the most important step. This should be done before every event unless the events are stacked on top of one another, then once a week
- (5) Sun porches - To properly clean these areas you need to use a vacuum cleaner. Then you can mop and wax the floors. This should be done at least weekly.
- (6) The guest bathroom is used by the family and guests alike - a good cleaning once a week or as determined by social events is usually adequate, but it needs to be checked daily. Vacuum this area at the same time as the living room.
- (7) Plants need to be watered as deemed necessary by temperature and humidity levels. Generally speaking, three times a week is sufficient, once a week with miracle grow at half strength.
- (8) The back hallway and staircase need to be vacuumed and mopped at least twice a week.
- (9) Upstairs family area is cared for by the family with the exception of a housekeeping crew that arrives once every other week on Tuesday afternoons. Check before every event and tidy visible areas as necessary.
- (10) Sweep basement as necessary. The basement is a constant maintenance problem. Check regularly for leaks.
- (11) Sweep, dust and mop attic as necessary.
- (12) Recyclables need to be contained throughout the week and put out on the sidewalk in front of the house on Tuesday mornings for collection.
- (13) The (Flag Officer Title) REPFAC was purchased by the Coast Guard in 1976. A plaque indicating this is hung in the entryway. The names of all residents are posted on the plaque. Reference the contractor list for information on maintenance and ordering.
- (14) The cleanliness and upkeep of the residential areas is generally the responsibility of the residents. However, damage to specific areas, systems or appliances may require the attention of the SCA. When working in these areas, ALWAYS make sure that the residents are aware of your presence and approve of it. Make certain that the work will not impact the daily lives of the residents if at all possible.

- (15) The REPFAC is issued small appliances and food preparation tools and equipment for use during official events. Much of this equipment may be stored in the kitchen. Consult with the residents about the storage of official and private kitchen equipment. To the greatest extent possible, all equipment should be kept separate or be clearly labeled. Reference the REPFAC Inventory for a complete list of issued equipment.
- (16) The REPFAC maintains a current paint scheme, indicating all colors and coatings within the Quarters. Residents may choose to alter the color or finish of particular surfaces. It is vital that the paint scheme remain up-to-date to reflect all current colors and finishes for the sake of maintenance.
- (17) The SCAs office space and lavatory are located in the basement. While the SCA can expect that all office work may be performed here, it is a shared office space and must therefore be kept clean at all times. The SCA should expect that the (Flag Officer Title) may have occasional need to use the office and its supplies/storage. These spaces are representational in nature.
- (18) There are currently 2 standard CG Workstations issued to the quarters. One is located in the north-east room on the first floor, traditionally kept as a Flag Office. The second is in the basement and is for the use of the SCA. Network connections and hardware are located within the SCA's office and are maintained by the local ESD.
- (19) A STE phone and card are issued to the (Flag Officer Title) and stored securely at the REPFAC. The SCA is a responsible custodian for these items.
- (20) The SCA maintains a comprehensive list of all Coast-Guard-owned property associated with the REPFAC. The inventory catalogs *all* property in the REPFAC and is kept at the Federal Building (for off-site service functions) and its location when stored. This unit-level inventory serves as a tool for the SCA and the residents to be aware of the current furnishings at the REPFAC, particularly during times of transfer. All items purchased with AFC-30 funds that remain at the REPFAC and are permanent additions to its inventory should be catalogued when purchased.
- (21) The SCA is also the custodian of the *official* property list in ORACLE. This property list is not as comprehensive and only lists items *required* to be listed officially. It is vital that both documents remain current and accurate.

i. **REPFAC- Important Places.**

- (1) *Furnace/HW Heater:* These units are located in the southwest storage room in the garage. The power switch for the furnace is located on the wall behind and to the right of the unit.
- (2) *Humidifier:* The HVAC unit contains an integrated humidifier which is located in the “deep storage” room in the southeast corner of the garage. Its control panel is located on the side of the attached ductwork. Humidity is controlled automatically using an external temperature sensor which exits the house on the western side, near the southwest corner. Humidity can also be manually controlled at the control panel. A water discharge pipe runs

under the stairs, around the perimeter of the laundry room and into a floor drain, behind the slop sink.

- (3) *Basement Water Pump:* The REPFAC basement has an installed, “dry” system. Included is a pump to manage any water buildup that may occur. The pump is located in the southwestern-most corner of the basement on the deck. It should be inspected routinely, especially during times of heavy water accumulation, to ensure that its battery has sufficient charge.
- (4) *Air Handlers:* The HVAC system throughout the house is managed by two air handlers. One is located in the laundry room, in the basement. This unit manages air to the basement and first floor. The second unit is located in a crawl space on the third floor and manages air for the top two floors. The “office” (northeast room on the first floor), a later addition to the REPFAC, is supplied by its own system which is mounted on its southern wall. All three exterior units are located on the east side of the REPFAC. Each system should be inspected semi-annually, before winter and again before summer.
- (5) *Thermostats:* The thermostat control panel for the lower air handler is located on the bulkhead in the living room, near the dining room. The panel for the upper handler is located on the second floor on the hallway bulkhead.
- (6) *Water valves:* Water valves for various locations are located throughout the basement overhead and are tagged and labeled. The Main water valve is located in the southwest storage room on the bulkhead near the entrance to “deep storage”. It has a red knob, which is tagged. Shutoff valves for the exterior spigots are as follows:
 - (a) *Front spigot:* Southwest basement storage room, in the overhead, to the left of the furnace. White knob. Tagged.
 - (b) *Patio:* Laundry room overhead, in front and to the left of the slop sink. Red knob. Tagged.
 - (c) *East side spigot:* Laundry room, in front of air handler on crossbeam. Red Knob. Tagged as “in garage”.
- (7) *Gas Valves:* The Main gas valve is located on the southern bulkhead in the southwest corner of the basement near the water pump. The valve is grey and is tagged. Other important shutoff valves are as follows:
 - (a) *Patio Grill:* In addition to the exterior gas valve, and interior shutoff for the grill gas line is located in the laundry room overhead, in front of the washer and dryer, near the air duct. Red knob. Tagged.
 - (b) *Kitchen Stove:* In the cabinet directly beneath the stove on the lower shelf. Red Knob. Tagged. The electric outlet for the stove is located in the same cabinet.
 - (c) *Fireplace:* On the northern bulkhead of the southwest storage room, behind and above the HW heater. Red valve. Labeled on bulkhead.

- (8) *Electrical Panels:* The main electrical panel is located on the northern bulkhead of the laundry room, to the left of the slop sink. A sub panel is located in the northeast room on the first floor. It is enclosed in a cabinet in the northeast corner of the room.
- (9) *Alarm System:* The REPFAC alarm system includes door and window sensors as well as sonic/motion sensors throughout the house. The control panels for the system are located in the east hall near the entrance to the garage and in the master bedroom on the east bulkhead. The access code is managed by the SCA and AHO and may be changed by the residents. It is recommended that a system briefing with a service representative be scheduled for each new SCA, (Flag Officer Title) and family so that the system may be set up to meet their needs.
- (10) *Garage Door Opener:* The garage door opener includes two remote units to be issued to the residents and one wall panel, located outside of the garage door on the western bulkhead. The code is managed by the SCA and may be changed by the residents. The door system is not currently integrated with the alarm system, but can be integrated by the alarm technician.
- (11) *Fire Extinguishers:* On the representational floors, the extinguishers are located in the garage on the bulkhead near the entrance to the house, under the kitchen sink and in the basement hall. Two extinguishers are located in the residential areas and may be placed at the convenience of the residents.
- (12) *Escape Ladder:* A 25 foot (3-story) escape ladder is located in the residential areas and may be placed at the convenience of the residents.
- (13) *Manual/Pubs:* Manuals and publications for systems, appliances, procedures and tools at the REPFAC are maintained by the SCA and are located in the SCA Office. Missing or more current manuals and pubs can typically be found online or through the service provider.
- (14) *Facility Maintenance Contact Sheet:* This reference list is managed and updated by the SCA and includes contact information for all current contractors used routinely at the REPFAC. For emergent reference by the residents, a printed copy is posted in the SCA office on the bulletin board.
- (15) *Front Office Shared Folder:* The front office manages a shared folder into which all front office staff may save documents on the CGDN. This enables any and all staff members to view and update documents from any of the folders and obtain real-time information. Within the (Z:) drive, find "Front Office". Within that folder is a "Special Command Aide" folder. This is where the SCA can expect to save all of his/her administrative work, whether it be housing management files, entertainment files, menu, cash logs, publications, etc. The incoming SCA should familiarize him/herself with the structure of this file.

j. **Daily Routine.**

- (1) To the extent possible, the SCA will keep normal and consistent working hours comparable to other enlisted members in the area. The primary place of work is the REPFAC, however the SCA may be required to report to, or work at, the Federal Building as necessary.
- (2) The nature of the position dictates that the SCA remain flexible and available for after-hours, weekend and/or holiday functions, as dictated by the REPFAC's official event schedule or maintenance/contractor requirements.
- (3) Daily, weekly, monthly and annual/seasonal checklists have been published to assist the SCA in day to day scheduling and facility upkeep. These checklists shall be followed and updated as necessary to remain current.
- (4) A government vehicle (GV) is not issued specifically for use at the REPFAC. It is often most expedient for the SCA to use his/her POV for local travel for official purposes. In these cases, travel should be documented in the local travel log. All travel entries should contain a reference to supporting documentation (PR number, receipt, etc.) The SCA shall submit a local travel reimbursement form (SF-1164) to the Aide either monthly or quarterly for processing. Work related travel to/from the Federal Building is not reimbursable. When possible, trips should be combined to limit time away from the REPFAC and limit travel distances. Should there be a specific need for a GV, arrangements may be made with the local custodian at the Federal Building or with the Aide.
- (5) All appointments (personal or official) that will require an absence from the REPFAC during working hours should be scheduled in advance and should be conveyed to the front office staff and to the spouse.
- (6) Inclement weather conditions can often impact one's travel. During such cases it is vital that the SCA work with the flag officers staff and spouse to mitigate the impact of weather and plan accordingly to manage its impact on the REPFAC.
- (7) The SCA will be issued a badge for access to the Federal Building which will include access to the basement parking garage. Though access is granted, the SCA is *not* issued an exclusive parking spot. During visits to the Federal Building where need for a parking spot arises (i.e. off-site lunches) the SCA should work with the Aide, Admin. Assistant and Parking Custodian to secure temporary parking. In cases where parking is less a concern, the SCA should seek to park at Station Malbec.
- (8) The SCA is required to attend all mandatory training and all-hands evolutions at the Federal Building. Other (Flag Officer Title) events will be handled on a case-by-case basis. If not in a food service capacity, the SCA will don the Uniform of the Day.

k. **Uniform Maintenance.**

- (1) A major duty of the SCA is to prepare and maintain the flag officers uniforms and equipment. By virtue of rank and position, the Admiral is expected to be perfect in personal appearance.

- (2) The SCA prepares and maintains the Admirals uniforms and equipment. The flag officer's uniform and equipment are expected to be free of defects. The SCA must have a thorough knowledge of all authorized Admirals uniforms and equipment. Uniforms are expensive, and they may be damaged easily by improper pressing techniques, high temperatures, or the use of incompatible spot removers or cleaning fluids. However these precautions should not keep the SCA from performing routine maintenance on uniforms and equipment. The SCA is strongly advised to read clothing labels and equipment maintenance instructions. When in doubt the enlisted aide should check with dry cleaners or equipment maintenance experts.
- (3) The following is a list of uniforms and common maintenance performed for the Admiral. If a need develops for a new or replacement uniform or part thereof, contact (local exchange or UDC)
- (4) Set up the next day's uniform on the chrome extension rod in the hallway closet at the top of the first floor staircase. You should include Pants with Belt or Suspenders, Shirt with Tie, and Jacket. Shoes will be left on shelves. Laundry should be done nearly every day so as to not fall behind.
- (5) ODU's - You can take the ODU's to the cleaners (Jacobs Cleaners) and have them laundered, starched and pressed, ensuring that you have the pockets pressed, flaps up. When you get the uniforms back from the cleaners you will undoubtedly have broken buttons that will require sewing back on, and press the pocket flaps back down.
- (6) Boots - A high spit shine is the standard.
- (7) Garrison Cover - Periodically check to make sure it's still serviceable and the stars are properly attached and clean. Little to no maintenance is necessary on the Garrison Cover.
- (8) Belt - Periodically check to ensure that the belt is serviceable.
- (9) Alphas and Bravos - The Admiral primarily wears these uniforms. The Admiral has 2 sets of A/B uniforms labeled on the Care Label as A1 or A2. When dry cleaning is necessary, you need to take his uniforms to Jacobs Cleaners. Febreze (clothing / air freshener) may be lightly sprayed into the jacket between uses to extend the wear life.
- (10) Shirts - Start with Jacobs Cleaners, after one wearing, the shirt can be re-pressed. After a second wearing, you can launder the shirt yourself; heavy spray starch and iron back up to standard. Attach nameplate, all awards and badges photo print out in closet. Start the process over at the dry cleaners again.
- (11) Pants - After use determine if the pants need to be dry-cleaned. If not, press them with a lint free cloth between the iron and material and hang them from a pants hanger (fully extended) with the belt placed through the loops.
- (12) Coat – Admiral keeps it in the office. Periodically check it for dandruff on the stars and shoulders / collar and determine if the coat needs to be dry-cleaned. If not, pressing the back of the coat as a minimum in the same manner as the pants should be done weekly. If

the coat does need dry-cleaning, you must remove shoulder boards before turning into dry-cleaner.

- (13) Shoes - The admiral wears smooth leather shoes with his Class SDBs. A very high spit shine is required and edge dressing should be applied weekly.
- (14) Tie - Should be ironed and hung in closet with uniforms.
- (15) Shine buckle at least once a week and place through the belt loops on the pants.

1. **Official Events and Entertaining.**

- (1) *REPFAC Dinners and Receptions:* Typical dinners are for between 4-8 guests; receptions usually ranging from 10-30 guests. Given the layout of the REPFAC, a total party of eight for a formal seated dinner is the most that can be comfortably accommodated. Format, course, layout and seating preferences are important considerations that are directed by protocol principles and the (Flag Officer Title)/spouse.
- (2) *Front Office Lunches:* The (Flag Officer Title) regularly hosts community leaders, partners, industry representatives and other VIP's for business lunches at the Front office. Typical party size is 4 to 6 and the Admiral's office usually serves as the venue. The lunch menu is coordinated with the Admiral and Aide and should be light, simple fare and easy to consume. Portions should be appropriate for the lunch hour. The SCA is responsible for food preparation (usually off-site), venue setup, lunch service and cleanup.
- (3) *Large REPFAC Functions:* Large functions can involve 50-200 guests and may require advance planning and coordination with other branches of a planning committee established for a specific event. The largest event on the (Flag Officer Title)'s entertaining calendar is the Holiday Season Open House, typically scheduled in January. The SCA will usually be responsible for various areas of planning and execution, including food/beverage procurement and preparation, equipment rental and contracting, venue setup and staff management.
- (4) *Spouses' Club Events:* The (Flag Officer Title) and his/her spouse are expected to host a number of annual spouses' club events. These events occur at the REPFAC and may require the SCA to assist with food procurement/preparation, event setup, service and cleanup. The SCA shall work closely with the (Flag Officer Title)'s spouse to ensure all requirements are met for these events.
- (5) *Event Staffing:* Certain events will require additional staffing to assist with food preparation, venue setup, food service and cleanup. Junior Petty Officers from the (Flag Officer Title) Staff or local units augment the REPFAC staff when necessary. Local Coast Guard Auxiliary assistance through the AUXCHEF program is a valuable avenue for event support and can be coordinated through the Aide and the local area Auxiliary Branch Chief. The SCA is responsible for appropriately outfitting all food service personnel and will ensure all staff is adequately briefed on sanitation, food service etiquette and professional conduct.

- (6) *Event Funding*: The majority of events will be funded through the (Flag Officer Title)s personal finances though official accounts are used to fund larger events. It is important that all funding be kept separate and accounted for accurately for post-event reporting. Delivery of funding from Coast Guard accounts can be obtained by check or cash from the Administrative Assistant. Delivery of personal funds is at the discretion of the (Flag Officer Title) and any number of modes of delivery may be utilized. The SCA should seek to establish reliable access to personal petty cash to minimize the impact that this need may have on the (Flag Officer Title) or the spouse. Personal Petty Cash intended only to be used for official purposes only.

m. **Recurring Social Events.**

- (1) (Flag Officer Title) Holiday Party – December
- (2) (Flag Officer Title) Summer Barbeque – Summer
- (3) Spouses' Club – Farewell/Installation of officers – Spring
- (4) Spouses' Club – Spouses Tea – Fall
- (5) Spouses' Club – Ornament and Cookie Exchange – Holiday Season

n. **Social Events Planning, Protocol and Accountability.**

- (1) Through calendar meetings, protocol requirements, and input from the Admiral and (Admirals Spouse), a great many social events will appear on your horizon. Close attention must be paid to any and all tidbits of information caught in passing to catch the subtle nuances that may evolve into an event. Planning, preparing, performing and final disposition of goods, receipts & moneys are all vital steps in the event process.
- (2) **PLANNING** - Once you have an idea that an event is being planned there are many questions that need to be asked to determine the appropriate actions to be taken.
 - (a) What type of function is it going to be? (Black Tie, Civilian Informal or Private Dinner; Breakfast; Luncheon; Tea or Coffee; Cocktail Reception; Bar-be-cue; etc. etc.)
 - (b) What is the relationship of the guests to the admiral? (Relatives & family; Office personnel; Subordinate Commanders; U.S. Officials; Foreign Dignitaries, etc.)
 - (c) What dietary restrictions are there? (Vegetarian, Kosher, Allergies, etc.)
 - (d) Is there funding in place and if so what percentage is covered?
- (3) **PROTOCOL** - The admiral's aide is very helpful in determining official protocol requirements. They will provide official gifts when needed as well as all the normal paper items. Some of the items provided by protocol are:

- (a) Menu cards
 - (b) A seating chart
 - (c) Place cards (first name printed on the back)
 - (d) Guest Book Card
 - (e) Points of contact for the Chorus and other entertainment personnel
- (4) **PREPARATION** - As you begin to answer the above questions you will be able to determine what tone the party will take on. You can begin to make determinations as to the level of grandeur, what type of table setting, which set of china, stemware, flatware, and linens will be needed. Menu development should also begin to take form. Some of the requirements to consider are:
- (a) What time of day is the function taking place and how much time is allotted?
 - (b) How much time can realistically be dedicated to food preparation without taking away from house cleaning, uniform maintenance and military requirements?
 - (c) What are the local specialties of the area and what foods are in season? Visiting guests usually enjoy a sampling of the local fare.
 - (d) Make a detailed shopping list. Don't forget to consider every aspect from Flowers to cleaning supplies. Shop as early as possible to ensure availability of goods. Shop as late as possible to ensure freshness of perishables.
- (5) **DAY OF** - This is when it all comes together. The entire house needs to be dusted, vacuumed, polished. Outside - does the lawn need to be mowed, sidewalks swept? The table needs to be set, wines chilled, after dinner liquors set out, and obviously the food needs to be prepared. When the guests arrive you need to be properly dressed for the occasion - from jacket & tie for formal dinners to western attire for a bar-be-cue. At the close of the event everything needs to be cleaned up and put away.
- (6) **DAY AFTER** - In the aftermath, when all seems well, there are still a few items that need your attention.
- (a) Receipts - having kept close track of all expenditures will make this fairly painless. When you have all of your information straight, it simply goes through the front office for reconciliation. Using a separate envelope for each function's receipts will help keep you straight. Time of day is the function taking place and how much time is allotted?
 - (b) Leftovers - At times this can be much more than a plate of food. You may have flowers that can be kept for another upcoming event. You may also need to return rented or borrowed equipment such as punch bowls & champagne fountains or even tents & grills. Some foods may carry a high dollar value and have come from a funded source so freezing them for a later use may be necessary. Communicate with your admiral for guidance.

- (7) **ACCOUNTABILITY** - for all things someone must be held accountable. Some of our primary areas are:
- (a) REPFAC furniture **Mr. Chianti (123) 696-9606.**
 - (b) China, Crystal and flatware **Mr. Chardonnay (703) 696-9606.**
 - (c) Liquor - there is a liquor cabinet in the basement of the quarters containing a wide assortment of wines and liquors, which is ultimately controlled by the SCA. The key to the liquor cabinet is kept by the SCA, There are computer files developed to maintain this account in Excel under "House" sub file "Liquor" listed by year then month.
- o. **Administration.**
- (1) *Petty Cash Accounting:* A current petty cash ledger shall be kept by the SCA to account for the (Flag Officer Title) personal funds used for official or REPFAC business. If a checking/savings account is established for access to petty cash funds, the SCA will maintain detailed records for this account to augment the current Petty Cash Account Log.
 - (2) *Rolling Project Worksheet (To-do list):* The SCA is responsible for maintaining and updating the "To-do" spreadsheet, used to organize and prioritize project workload and track progress of current/upcoming spend plan requirements.
 - (3) *Official Event Accounting:* Following every official event (including dinners, receptions, lunches, etc), the SCA shall keep an electronic copy of all receipts, event invoices and menus in a designated location in the SCA's folder on the share drive. Hard copies of receipts shall also be filed at the REPFAC. In addition, for all events using discretionary funding, the SCA shall provide the Admiral's Admin Assistant with original receipts, event invoice and menu in accordance with discretionary fund accounting guidelines.
 - (4) *Daily Communication Log:* The SCA shall submit a daily Communication Log outlining current activities and projecting the next week's REPFAC schedule. A hard copy should be printed and left for review before departing the REPFAC.
- p. **Household Planning, Purchasing and Preparation of Food and Supplies**
- (1) Shop for household items as often as deemed necessary. (Admirals Spouse) will help to plan the week's menus and assist in assembling a shopping list and provide the funds necessary. Everything from meals, packed lunches and snacks to cleaning supplies needs to be considered. Use of your POV will be necessary for your shopping trips and errands.
 - (2) For the Admiral's personal account, you will need to get a check for all required purchases. In the case of the grocery store, we take a signed blank check and fill in the amount as necessary, These expenditures are all tracked in the a ledger as well as in the computer. The computer file for the house account is in Excel, the file is "House". The ledger and the computer file are maintained simultaneously.
- q. **Errands**

- (1) Errands can be an elusive area but will definitely encompass the following:
- (2) Grocery Store - Groceries, cleaning supplies, snacks and emergency supplies need to be checked constantly. A list of needed items is kept attached to the refrigerator.
- (3) Dry Cleaning - It's always coming or going - stay on top of it.
- (4) Gifts - Incoming and departing Generals, and friends of the Admiral will regularly be provided fruit baskets, flowers, muffins and even dinner (covered dish). Close coordination with (Admirals Spouse) is a must.
- (5) Office - Daily, something either needs to be taken to or brought back from the office. Close coordination with the Admirals Aide is a must.

r. **REPFAC Management.**

- (1) *Spend Plans:* The annual Spend Plan is a list of all items required for the next fiscal year and includes utilities costs, required service contracts, interior maintenance/improvements, appliances, furnishings, SCA support, and other miscellaneous items. The Spend Plan is submitted by _____ every year. The five-year rolling spend plan is a five year plan of expected expenses.
- (2) *Business Case Analysis and Scope of Work Documentation:* Business Case Analyses are required for certain types of expenditures and are submitted along with the annual Spend Plan. The SCA is typically required to provide input for these documents.
- (3) *Purchases:* The SCA is issued a credit card for micro-purchases (P-Card). The card is to be used to make only approved purchases of goods and services to advance the maintenance and upkeep of the quarters in accordance with the current spend plan. The P-Card may be used to pay for contracted services, provided that the fee does not exceed the micro-purchase threshold of \$3,000.
- (4) *FPD/PCA:* The SCA must have active accounts in FPD and PCA. All Purchase Card expenditures must be approved through the PR process in FPD and in accordance with local procedures. The SCA is required to update and confirm Purchase Card transactions in PCA when scheduled.

s. **Receive and screen telephone calls / security**

- (1) Telephone courtesy and correct procedures are important and the primary key is the manner in which the call is answered. A proper example of the greeting would be, "Good morning,, Petty Officer _____ speaking, may I help you?" You do not want to give the Admiral's name out for security purposes
- (2) **MESSAGES** - All messages taken at the REPFAC must be accurately recorded. Some of the information that you need to include would be:
 - (a) The name and title of the caller

- (b) The text of the message
- (c) The telephone number of the caller
- (d) The time and date of the call
- (3) **SCREENING TELEPHONE CALLS** - Special attention needs to be paid to incoming calls and the availability of the Admiral and his family. Sometimes it's guesswork but you need to know which calls are imperative to be passed on and which can wait.
- (4) **SECURITY** - Periodically calls will come in that are of a nature that require special attention. The aides should be aware of policies that are in place to handle these calls such as News Media, Disgruntled Sailors, Telephone Solicitors, Crank Calls or even Bomb Threats. Some of the primary people to notify in the event of any of these calls would be the XO, CMC, and even the Local Police (123) 696-3113 or base security (123) 685-3139.
- (5) **HOUSE SECURITY SYSTEM** –The REPFAC is equipped with a security system that sends alarms to the Local Law Enforcement and Fire Departments as appropriate. At the current time the intrusion alarm system is not turned on, this is the admiral's preference. If this desire changes or if a problem in the system is detected contact **Mr. Port** at (123) 696-8876.

t. **Professional Development.**

- (1) *Program Training:* Acceptance into the SCA program entitles the member to three weeks of training in Fort Lee and 1 week of on the job training in Washington, D.C. with the SCA's of the Command Staffs as well as attendance of the Army Advanced Culinary Skills School in Fort Lee, VA. In order to maximize the value to the member and the unit, the SCA should seek to schedule this training as soon as possible.
- (2) *Backfill Considerations:* As an independent-duty SCA, backfill for any TDY orders is a concern. The SCA should work with the (Flag Officer Title) and spouse to find a convenient time to attend training. Project lists and daily and weekly duties should be taken into account (i.e. snow removal, lawn care, pending contracts). The AHO can be a potential resource for backfill issues.
- (3) *Fleet Training:* The SCA position does not make use of standard FS paperwork or accounting procedures. It is the responsibility of the SCA to maintain awareness of changes and developments within the fleet through contact with FSAT and use of the FS Information Portal. Before PCS, the SCA should evaluate any shortfalls in aptitude and seek training with local units or at "C" schools to augment his/her skill sets before returning to the fleet.
- (4) *Road shows/Tradeshows:* Often, groups of FS personnel from throughout the Coast Guard will assemble to conduct specialty training during road shows within Districts, at TRACEN Petaluma, the Coast Guard Academy or elsewhere. This training is sometimes held in

conjunction with a major industry trade show (ACF, Catersource, etc.). Announcements for such training will be posted within the FS Information Portal and in the FSAT Newsletter. The tradeshow can be a valuable resource for information on available products and advancements within the Food Services and Catering Industries and can add value to the unit.

- (5) *Local Training:* Valuable culinary and hospitality training can be found locally through degree programs offered at Castrolin Community College and organizations like the Napa Wine School and the Jive Bartending School. Non-degree programs are typically not funded through Tuition Assistance. Requests for TDY training of this sort must show the direct value added to the unit and to the Coast Guard through the training and cost-savings.
- (6) *Institutional Training:* Many culinary institutes (Culinary Institute of America, New England Culinary Institute, Johnson and Wales) offer individual continuing education courses at their regional campuses. TDY orders for these courses are authorized and may be requested locally. As with all TDY requests, the SCA must show the impact in added value to the member, unit and Coast Guard.
- (7) *Internships:* When schedule allows, the SCA may pursue local internship opportunities to augment her/his skills. Many restaurants, hotels and catering firms in the area are open to military personnel learning within their companies. The procedure for obtaining and documenting an internship is very specific and requires legal documentation. Information about establishing an internship, as well as all applicable forms, can be found through the FS Information Portal or through the SCA Program Coordinator.
- (8) *Industry Certification:* There are many industry organizations that offer professional certification courses, often taking advantage of the member's on-the-job hours. Top Certifications include: American Culinary Federation (ACF), Servsafe, International Food Service Executives Association (IFSEA), Prochef (Through Culinary Institute of America), and the United Services Military Apprenticeship Program (USMAP).
- (9) *Supply, Procurement, Contracting:* The SCA position exposes the member to much responsibility within the world of procurement not related to food service. This knowledge can be a valuable tool later in one's career when applying for Warrant commissions and further. The SCA is encouraged to take advantage of all the local knowledge of the AHO, Comptrollers, Contractors and Procurement Specialists. There is often local training involving these subjects. Courses like FPD Basic and SAP Basic can build procurement understanding from a foundational level. The Defense Acquisition University provides many courses and training opportunities for various levels of acquisition.
- (10) *On-job-training (OJT):* The SCA position will expose the member to many areas of facility maintenance and home repair as well as many contractors and professionals. The SCA should seek to learn as much from these individuals as possible about the REPFAC systems, their repair and operation. Subject knowledge in areas such as basic electrical wiring, carpentry, painting, plumbing, machinery repair etc., may not only prove valuable to the unit in the future but will surely prove valuable to the member in future circumstances, both professionally and personally.

- (11) *Leadership OJT*: Frequent interaction with the highest levels of Coast Guard leadership and executives from a wide array of industries, agencies and government offices will expose the SCA to positive qualities and habits at the highest levels of leadership. The SCA should learn to recognize these traits and apply them to his/her work environment. The SCA should recognize front office Leadership not only as his/her superiors, but as a group of mentors who are willing to share their knowledge and experience with him/her. Through interaction, the SCA will no doubt learn very much. However it is up to the individual to build upon those experiences through questioning, introspection and application.
- (12) *Training Outreach*: Not only are there many training opportunities available to the SCA, but the SCA, in turn, becomes a valuable resource for other Coast Guard members and organizations. The REPFAC becomes an ideal training platform for other FS's who show interest in higher-level food preparation, event planning/execution and the SCA program in general. REPFAC events serve to advance the qualifications of Auxiliarists within the AUXCHEF program. The Spouse's Association benefits from chef demonstration and instructional events and other groups in the area (Admin. Assistants, Morale Committee, etc.) may benefit from the SCA's expertise in food preparation, protocol and event planning.



Template - SCA Relief Check-List

Representational Facility:	
Incoming SCA: Print Name and Rank	
Outgoing SCA: Print Name and Rank	
Date Relief Started:	
Date Relief Completed:	

Instructions: The relief process should take no more than 5 days. Upon completion, copies should be made for both SCA's records. Scan and email or fax a copy of the relief checklist to the Special Command Aide Program Manager @ (202) 372-4412

Reason for Checklist: This checklist is a compilation of items that were recognized as being necessary for a relief or extremely useful to an incoming SCA. With that said an outgoing SCA may deem additional information as necessary and that SCA is highly encouraged to share that information. During your tenure at the REPFAC, if you feel that anything should be added to this list or if there is something you have said "that would have been nice to know" please add it to this list. The below checklist is intended to be a minimum of tasks and information passed. If at any time you have any questions or concerns please feel free to contact the Special Command Aide Program Manager at the above number or via email.



Place initials in the corresponding block:	Out:	In:
Give a tour of the REPFAC: If possible with the spouse or Admiral, Point out common spaces/areas of responsibility and personal spaces both inside and outside the		
Identify emergency cut-offs: Locations of electrical panels and areas they control, Gas shut-off, main water supply shut-off, A/C handlers and their breakers, ect.		

Pass Down completed Maintenance work: Last time mulch was laid, generator maintenance, water filters changed, A/C filters changed, ect. Include the frequency of		
Pass Down any pending, ongoing, or needed projects: (Examples) Scheduled annual A/C maintenance, an electrician has been working on the outside lighting and it is not completed yet, Lawn equipment needs maintenance.		
Provide information about any contracts (ex: yard or pool): PR#, Company Name and phone numbers, Points of Contact at the company, Job scope of the contract, issues you may have had with the company, payment schedule, ect.		
Inform incoming SCA about mail delivery, garbage and recycling days/times: Include whether garbage/recycling is a private company or city pick-up. Provide contact information for bulk pick-ups and hazardous material disposal.		
Locate cleaning supply lockers, office supplies, uniforms and provide incoming SCA with information regarding all SCA instructions: identify specific things pertaining to that particular REPFAC. (ex: how often yard needs watering)		
Locate Admiral's and SCA's office.		
Pass down/introduce Points of Contacts for assistance with events: Bartenders, Servers, Door Greeters, ect.		
Pass down Fire/Burglar alarm information: Company POC, alarm panel, alarm code(s), back-up power for alarm and any other security codes pertaining to the		
Provide incoming SCA with contact numbers: Duty IT, Housing, facilities maintenance, Admiral's office/Aide, Help Desk, STE#, REPFAC fax #, ect.		
Provide incoming SCA with proper chain for submitting Procurement Requests: Who is the Supervisor and who the Funds manager is.		
Complete Property relief: Both parties should sign it and submit the report to the servicing SK shop.		
Complete Inventory report: Both parties should sign it and it should be submitted to the Admiral for signature.		
Provide location of all owner/operator manuals for all REPFAC equipment: Microwave, vacuum, garbage disposal, ect. Also, provide warranty information on any		
Provide location for all house keys and key locker: Exterior doors, sheds, guest house, ect.		
Set-up Credit Card: If not already completed schedule with the SKs for credit card training and complete the credit card application for the REPFAC. This should be completed prior to reporting.		
Provide a tour of the surrounding area and points of interest: Local butcher shop, restaurant supply stores, surrounding Coast Guard Units, Admiral's office. Introduce the incoming SCA to any points of contacts you may have concerning the REPFAC. Also		

Introduce incoming SCA to Chain of Command: Chief of Staff, Admiral's Aide, Command Master Chief, office staff, Local FS's		
If possible coordinate SCA relief with the Admiral's Change of Command.		
Familiarize incoming SCA with procurement process: Include XSF, ORFF and Admiral's personal funds. Incoming SCA should discuss with the Admiral how they are going to handle personal funds.		
Procure Smartphone if authorized:		
Establish WSIII access with local E SU.		
Get access card/ID badge if needed for office or REPFAC.		
If REPFAC is in a Gated Community register vehicle with that Communities Security and Office.		

This section should be used to denote any issues or concerns.

Comments:

(Insert Comments)

DRAFT

Template - Official Event Memo

U.S. Department of
Homeland Security



United States
Coast Guard

Pacific Area Commander
United States Coast Guard

1 A Hillcrest Rd.
San Francisco, CA. 94130
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MEMORANDUM

From: P.B.Phillis, FSC

Reply to Lant Area (p)
Attn of: P.B.Phillis
416- 399-3572

To: W. Bells , LT

Subj: REIMBURSEMENT LETTER

1. The following are expenses for the Dinner Party on January 4, 2011 hosted at Quarters "D". The total came to TWO HUNDRED- EIGHTY FIVE DOLLARS AND SEVENTY SIX CENTS (\$285.76) this amount should be reimbursed to Vice Admiral Cutter via the XXF account. The break down for EIGHTEEN guests and Four staff comes to TWELVE DOLLARS AND NINTY NINE CENTS (\$12.99) per person. Copies of receipts and the event Balance Statement Sheet are included.

Respectfully FSC P. Phillis

Template - Event Menu



Welcome to the Ninth District Commander's Flag Quarters:
On the Menu This Evening:

Soup Selection

Roasted Tomato and Basil Soup.

Salad Selection

Fennel Salad with Olives, Capers and Parmesan on a bed of mixed greens.

Main Course

Marinated Hanger Steak with Caramelized Shallots, Onion and Pepper Home Fries and Creamed Spinach.

Desert Selection

Quenelle of Vanilla-Bean Ice Cream served atop Shortbread Cookie with Strawberry-Rhubarb Sauce

Use of Appropriated Reception & Representation Funds (ORRF)	Use of Extraordinary Expense Fund (XXF)	Use of Commandant's Discretionary Fund (CDF)
<p>PURPOSE – Maintain standing and prestige of U.S. & DHS, or otherwise further DHS interest.</p>	<p>PURPOSE – Support Coast Guard members, employees, and families.</p>	<p>PURPOSE – Gift received from Coast Guard Foundation to be used at the discretion of the Commandant.</p>
<p>SCOPE OF FUNDED EVENTS</p> <p><i>Official Reception:</i> occasion whose primary purpose is to explain or interpret the programs of DHS.</p> <p><i>Representation:</i> entertainment of foreign dignitaries or domestic officials where principal purpose is related to a responsibility or concern of DHS.</p>	<p>SCOPE OF FUNDED EVENTS</p> <p>Activity whose primary purpose is promoting the morale and well-being of members, employees, and families; an activity may be funded where a purpose (but not the primary purpose) is to more fully advance the general interests of and good will towards the Coast Guard and the Coast Guard family.</p>	<p>SCOPE OF FUNDED EVENTS</p> <p>Any activity that bears a legitimate relationship to an authorized Coast Guard function. CDF can fund any activity that could be funded with ORRF or XXF.</p>
<p>PERSONS AUTHORIZED OFFICIAL COURTESIES</p> <ul style="list-style-type: none"> • Foreign officials, Federal, State, and local officials. • Foreign dignitaries in foreign countries, and domestic or foreign officials within or outside the borders of the United States. • Other distinguished or prominent citizens, who've made substantial contribution to nation or DHS. • News media. • Spouses in accordance with the guidance in DHS Management Directive 0540.. 	<p>AUTHORIZED PARTICIPANTS OR RECIPIENTS</p> <ul style="list-style-type: none"> • Coast Guard members, employees, and families (Coast Guard family). • Persons, including dignitaries and officials or other distinguished or prominent citizens, whose participation at the event is beneficial to members of the Coast Guard family who attend; who have made a substantial contribution to their morale or well-being; or whose activities regularly affect them or have the potential to affect them. • Representatives of community groups or other entities that offer material, social, family, patriotic or spiritual support to Coast Guard people beyond execution of Coast Guard programs generally. • Other prominent non-Coast Guard persons whose attendance is incidental to an event. • Spouses or immediate family members of a person who is outside the Coast Guard family but who is an authorized participant. 	<p>AUTHORIZATIONS AND LIMITATIONS</p> <p>Anything for which appropriated or nonappropriated funds could be spent. Examples:</p> <ul style="list-style-type: none"> • Reception and Representation • Morale, Welfare and Recreation support, including memorial services, and "all-hands" functions. • Traditional Ceremony expenses. • Informal Internal and External Recognition Items. • Retirement recognition items (Awards) • Cultural Awareness Program • Change of Command Reception, provided the primary purpose is to introduce the new Commander or Commanding Officer

Use of Appropriated Reception & Representation Funds	Use of XXF	Use of Commandant's Discretionary Fund
<p>AUTHORIZED USES</p> <ul style="list-style-type: none"> • Luncheons, dinners, receptions (excluding routine business meetings) <ul style="list-style-type: none"> • U.S. made gifts and • Participation expenses at DHS-sponsored events <ul style="list-style-type: none"> • Entertainment authorized in advance when highest levels of host country officials are present 	<p>AUTHORIZED USES</p> <ul style="list-style-type: none"> • Luncheons, dinners, receptions. <ul style="list-style-type: none"> • Social activities primarily attended by subordinate Coast Guard personnel to express appreciation and acknowledgement of the support and efforts of the Coast Guard family • Mementos presented for or on behalf of the Coast Guard family. • Memberships to represent the Coast Guard family in a community organization held in the name of the Coast Guard, or memberships made available to Coast Guard personnel generally for their morale or well-being. 	<p>EXAMPLE OF UNAUTHORIZED USES</p> <ul style="list-style-type: none"> • Change of Command Receptions for the benefit of the departing Commander or Commanding Officer. • Retirement Reception expenses. • Any personal expense or furnishing. • Personal gifts, souvenirs and mementos that are not otherwise authorized. • Official travel expenses. • Meals and/or refreshments at internal Coast Guard meetings, conferences or workshops.
<p>LIMITATIONS ON ATTENDEES</p> <ul style="list-style-type: none"> • Ratios: At least 20% must be non-DHS guests in parties < 30; 30% for larger. • DHS spouses may be invited when desirable and guests' spouses are invited and expected. 	<p>LIMITATIONS ON ATTENDEES</p> <p>Representative segments of Coast Guard personnel subordinate to the host will be invited to events. Where Coast Guard personnel or family members are not the majority of invitees, a written justification should reflect the purpose of the event, consistent with these rules. In rare instances, XXF funds may be used for events, not attended by Coast Guard persons other than the host, but only with written justification.</p>	<p>LIMITATIONS ON ATTENDEES</p> <p>Same limitations apply when event funded is for reception or representation or for MWR.</p>
<p>ACCOUNTABILITY – Invitees and actual attendee lists to be prepared. Quarterly reports to U/S Management</p>	<p>ACCOUNTABILITY – See draft 7000.1</p>	<p>ACCOUNTABILITY – Expenditures should be justified as to purpose and documented in writing in the CDF file. Account holder should determine the purpose that justifies the expenditure</p>

19 Aug 2009/CG-094



Template - Yearly Household Cost Report

Transaction Location	Description	Category	Date	Credit	Debit	Balance	Function
Opening Deposit			3/31/2006	\$100.00		\$100.00	
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	4/21/2006		\$8.60	\$91.40	Uniforms
Tops Market	Personal Shopping	Groceries	4/24/2006		\$48.66	\$42.74	Personal Shopping
Society Dry Cleaners	Personal Shopping	Groceries	4/25/2006		\$13.04	\$29.70	Personal Shopping
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	4/25/2006		\$8.07	\$21.63	Uniforms
Cash Deposit	Crowley Personal		4/27/2006	\$100.00		\$121.63	
Heimen's	Personal Shopping	Groceries	4/28/2006		\$28.37	\$93.26	Personal Shopping
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	4/28/2006		\$5.16	\$88.10	Uniforms
Tops Market	Personal Shopping	Groceries	5/1/2006		\$19.81	\$68.29	Personal Shopping
Dave's Market	Personal Shopping	Groceries	5/4/2006		\$28.54	\$39.75	Personal Shopping
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	5/5/2006		\$8.07	\$31.68	Uniforms
Cash Deposit	Crowley Personal		5/15/2006	\$100.00		\$131.68	
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	5/15/2006		\$25.37	\$106.31	Uniforms
Tops Market	Personal Shopping	Groceries	5/31/2006		\$31.35	\$74.96	Personal Shopping
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	5/31/2006		\$9.25	\$65.71	Uniforms
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	6/5/2006		\$14.41	\$51.30	Uniforms
Heimen's	Personal Shopping	Groceries	6/6/2006		\$36.29	\$15.01	Personal Shopping
Cash Deposit	Crowley Personal		6/12/2006	\$60.00		\$75.01	
Heimen's	Personal Shopping	Groceries	6/12/2006		\$31.68	\$43.33	Personal Shopping
Cash Deposit	Crowley Personal		6/26/2006	\$40.00		\$83.33	
Tops Market	Event Shopping	Groceries	7/5/2006		\$6.97	\$76.36	Staff Lunch Downtown
Giant Eagle Market	Event Shopping	Groceries	7/4/2006		\$47.29	\$29.07	Staff Lunch Downtown
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	8/4/2006		\$3.66	\$25.41	Uniforms
Cash Deposit	Crowley Personal		8/21/2006	\$40.00		\$65.41	
Giant Eagle Market	Event Shopping	Groceries	8/23/2006		\$55.40	\$10.01	Lunch w/ JO's
Tops Market	Event Shopping	Groceries	8/24/2006		\$3.59	\$6.42	Lunch w/ JO's
Cash Deposit	Crowley Personal		8/29/2006	\$80.00		\$86.42	
Society Dry Cleaners	Dry Cleaning	Uniform Maintenance	9/8/2006		\$10.59	\$75.83	Uniforms
Giant Eagle Market	Event Shopping	Groceries	9/13/2006		\$61.34	\$14.49	Lunch Downtown
Cash Deposit	Crowley Personal		9/19/2006	\$360.00		\$374.49	
CostCo	Event Shopping	Groceries	9/19/2006		\$108.24	\$266.25	Senior Leadership
Otto Graham Exchange	Event Shopping	Beer/Wine/Liquor	9/19/2006		\$100.29	\$165.96	Senior Leadership
Giant Eagle Market	Event Shopping	Groceries	9/19/2006		\$115.82	\$50.14	Senior Leadership
Giant Eagle Market	Event Shopping	Groceries	9/21/2006		\$15.60	\$34.54	Senior Leadership
Cash Deposit	Crowley Personal		10/6/2006	\$100.00		\$134.54	
Clifton Cleaners	Alterations - Gold Stripe	Uniform Maintenance	10/10/2006		\$25.80	\$108.74	Uniforms

3 Days Before	Completed	Assigned to:
Wash and dry all dishes: china, buffet platters, Hors d' oeuvres platter,		
Wash glasses		
Press Napkins		
Set table: iron table cloth, place settings, ect.		
Check on centerpiece		
Clean outside windows		
Polish silver and silverware		
Verify Assistance/request extras if need be		
Clean and fill salt and pepper shakers		
Bag ice as needed and place in freezer		
Complete lawn maintenance: mowing, edging, pick up leaves, ect.		

2 Days Before	Completed	Assigned To:
Make Shopping List		
Check all beverages		
Polish all brass		
Large can for umbrella		
Clean inside (furniture, light fixtures, ect.)		

1 Day Before	Completed	Assigned to:
Prep Hors d' oeuvres		
Prep Dessert		
Complete any Mise en Place that you can: Marinade protein, trim protein, ect.		
Chill beer and wine		
Make dinner rolls		
Cut or form butter		
Make sure you have enough ice		
Make timeline for the day of the event: suggest at least hourly increments		
Print recipes: this will help if others are assisting in the kitchen		
grill uncovered and pre-heated if needed		

Day Of	Completed	Assigned to:
Prep Main Course		
Prep Veggies		
Prep Sauces		
Wipe all glasses		
Prep Salad		
Prep starch		
Prep Coffee, tea, cream and sugar		
Assign stations: Serving, Bar, Front Door, ect.		
Make garnishes for plates or platters		
Clean entryway		
Trash out		
Vacuum carpet or dust hardwoods last minute		
Field day bathroom and make sure stocked		
candles in place (light 15 min before)		

Day After	Completed	Assigned to:
Re-inspect counters/cabinets, clean as necessary		
Re-check all garbage cans, pull any trash		
Wash/fold any linens		
Inspect silverware/china for damage		
Restock bar items as necessary		
Check for carpet soiling/stains		
Check bases of sofas for scuffs		
Check walls for handprints		
Inspect sills for crumbs/wipe down		
Re-arrange any chairs in dining room as necessary		
Inspect guest bathroom and clean as necessary		
Wash and replace kitchen mats		
Inspect outdoor gas grill, clean as necessary		
double-check serving utensil/platters/plates/napkins		

DRAFT

Shopping List

Commissary:

- Berries to have on hand
- Pitted Black Cherries 2 14oz cans
- Chocolate Ice Cream
- Fresh Cherries
- Chocolate cake mix
- Corned Beef
- Sauerkraut
- Relish
- Rye Bread
- Chicken
- Peppers Red Yellow Green
- Egg Plant
- Sour Cream
- Oranges
- Butternut Squash
- White Beans 4 cn
- Tubetti Pasta
- Hazel Nuts
- Fresh Basil
- Fresh Sage
- Fresh Thyme
- Fresh Rosemary
- Fresh Dill
- Pancetta
- 4 Cans Red Kidney beans
- Gallons of water

EXCHANGE:

- White Wine
- Triple Sec
- Grand Marinara
- Sweet Vermouth
- Myers Dark Rum

Costco:

- Banquette
- Flank Steak
- Romaine
- Mixed Greens
- Cherry Tomatoes
- Apple Wood Smoked Bacon
- Deli Roast Beef, and Ham
- Frozen Salmon
- Cucumbers
- Tuna Fish

Safeway:

- Eggs
- Lemons
- Fresh mozzarella
- Black Pepper
- Cheddar Block
- Cumin
- Epson T0481
- Sun Dried Tomatoes