

## Introduction

The purpose of this document is to provide a Standard Operating Procedure (SOP) for retiring officers and members of the Department of Health and Human Services (HHS) and, other non-HHS federal agencies and programs. The role of the SOP is to facilitate the retirement planning process. This SOP is a handbook that details planning formal/informal and onsite/offsite retirement proceedings. It provides guidance as to team leadership, specific roles, activities and responsibilities that makeup the major teams involved with the retirement process. This SOP is intended to serve as a reference document to facilitate leaders' retirement planning processes while enhancing knowledge of event planning processes.

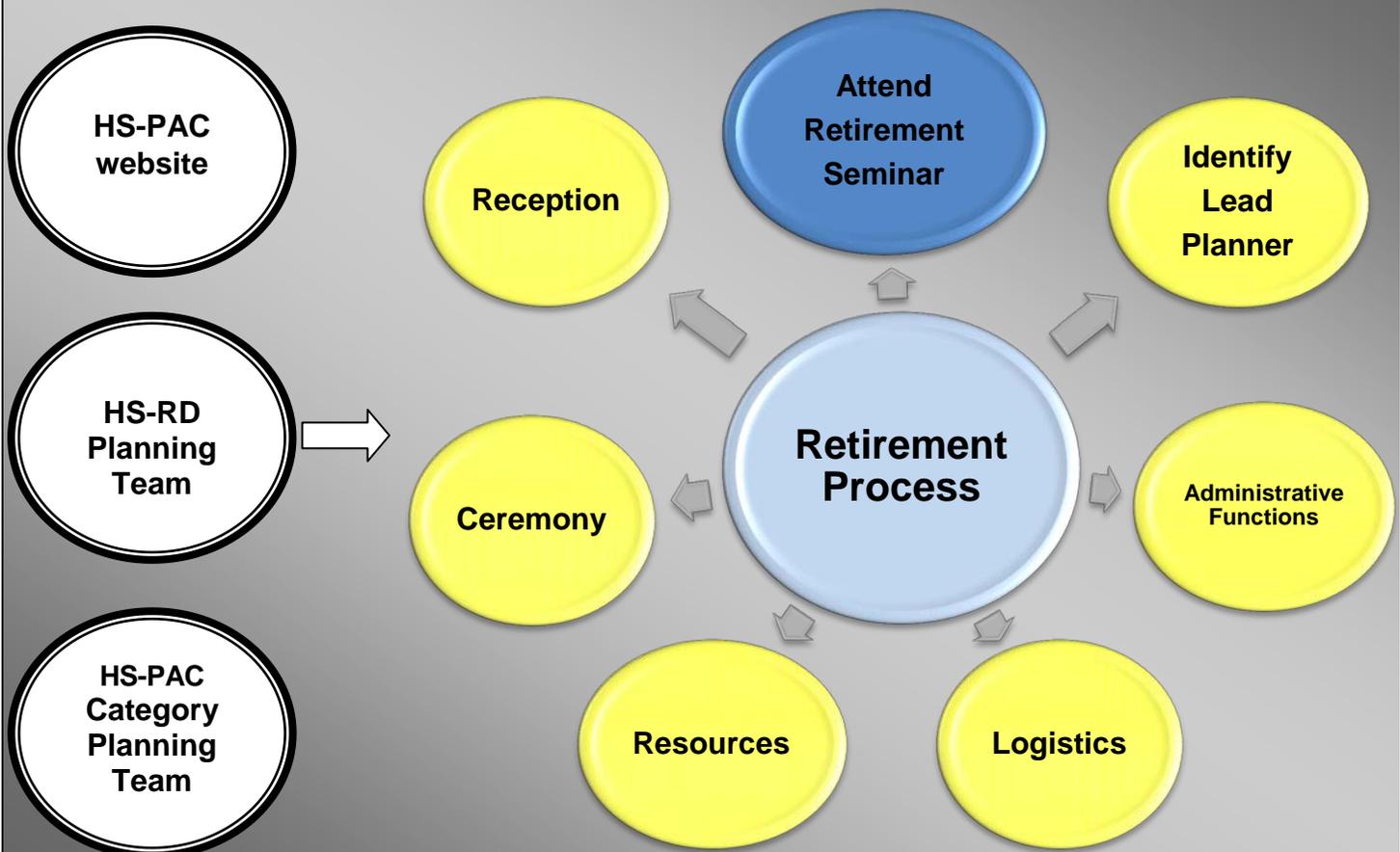
## Overview of Retirements Retirement Workgroup Goals

1. To provide easy access to retirement planning resources.
2. To provide a road map to navigate the retirement process.

## Overview of the Retirement Planning Process

There are seven distinct planning items in the Retirement Working Group planning team as shown below. The specific roles and responsibilities of each item follow in the next section.

## Ad Hoc Retirement Working Group



# Retirement Process and Overview Timeline



## Major Roles & Responsibilities

**Separations Counselor Team Lead:** CDR Mark F. McKinnon

The retirement seminar was created by the Compensation team and the Commissioned Corps Training Academy to disseminate all information concerning the retirement process and the benefits and entitlements that are afforded to all retirees.

The goal of the Separations Counselor is to coordinate and assist you through the process of leaving active duty and aide transition by:

- Pre-separation counseling;
- Tracking and management of separation requests made to DCCPR;
- Coordination of personnel processing to include leave management and travel entitlements;
- Exit Interviews/Retention Surveys;
- Communication hub for officers, family members and agency representatives;
- Information and expectation management; and
- Survivor Assistance.

All officers should attend a retirement seminar between their 14<sup>th</sup> and 18<sup>th</sup> years of active service. Attendance at a retirement seminar should occur every couple of years until retirement. This will ensure that all knowledge concerning retirement policies and procedures is up-to-date. Please sign up with DCCPR separation counselors and visit the following website: <http://ccmis.usphs.gov/CCMIS/separations/separations.aspx> or send an email to [PHSCCSeparations@hhs.gov](mailto:PHSCCSeparations@hhs.gov).

**Joint Agency Guidance Team Leader:** CDR Cheryl Lynn Fajardo  
Collaboration for joint/inter agency formal and informal retirement ceremonies.

**Internal Agency Guidance Team Leader:** LCDR Erin Grasso  
Collaboration for internal agency formal and informal retirement ceremonies.

**Lead Planner Team Lead:** Identified by Retiree

Responsible for the following:

- Coordinating retirement ceremony participants
- Securing venue
- Planning menu/refreshments (Hiring bartenders/caterers)
- Coordinating cake
- Coordinating letters of appreciation
- Booking entertainment
- Coordinating decorations
- Coordinating flowers
- Coordination of the shadow box, and ensuring the event runs smoothly.