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COMDTINST 5224.11B
15 DEC 2006

COMMANDANT INSTRUCTION 5224.11B

Subj: ORGANIZATIONAL PERFORMANCE CONSULTANTS

1. PURPOSE. This Instruction provides policy, procedures, and guidance concerning the use and duties of Coast Guard Organizational Performance Consultants (OPCs) in achieving Coast Guard goals for mission execution, mission support, and people and platforms.
2. ACTION. Area and district commanders, commanders of maintenance and logistics commands, commanding officers of headquarters units, assistant commandants for directorates, Judge Advocate General, and special staff offices at Headquarters shall ensure compliance with this Instruction. Internet release authorized.
3. DIRECTIVES AFFECTED. Quality Performance Consultants, COMDTINST 5224.11A is cancelled.
4. DISCUSSION. The Quality Performance Consultant (QPC) Program was established in 1994 to help integrate Total Quality Management principles into Coast Guard work. This program is authorized pursuant to 14 U.S.C. 632. Since the Program's inception it has provided a valuable, internal resource to help commands and staffs align with and use Coast Guard management policies, practices, and tools to enable systematic performance assessment and improvement. Today, the consultants use Coast Guard management doctrine and Organizational Development (OD) principles and practices to enable organizational performance improvement. Deliverables are collaboratively designed, planned, and implemented to help leaders and managers align with Coast Guard systems and to realize their desired outcomes. Success is predicated on bringing together consultant organizational skills and expertise with command and staff knowledge of missions and organizational environment. To reflect the Program's organizational performance focus, QPCs have been renamed **Organizational** Performance Consultants (OPCs).

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- a. Commandant (CG-0931) is responsible for Coast Guard performance management and decision support systems incorporating performance excellence principles and practices, of which OPCs are a critical component. The OPC Program is directed at the following outcomes:
 - (1) The Coast Guard at all levels uses the Commandant's Performance Excellence Criteria (CPEC) to systematically assess and improve performance.
 - (2) The Coast Guard is aligned at all levels with enterprise-wide performance management doctrine and policies.
 - (3) The Coast Guard focuses at all levels on high-impact organizational improvement.
 - b. The policy and procedures contained herein outline standard OPC roles, responsibilities, and practices to deliver services to Coast Guard commands and staffs in their efforts to improve overall performance and attain alignment with Coast Guard management doctrine and policies.
5. **POLICY.** Using the CPEC framework and Commandant's performance management doctrine and policies, OPCs deliver products and services aimed at helping clients and their organizations reach desired outcomes. For detailed information outlining both procedural and policy guidance, refer to the OPC Standard Operating Procedure (SOP), which may be found on CG Central via the following path: **Communities: Find a Community: Browse for a Community: *Expand (+)* Command: Performance Management: Organizational Performance Consultants (OPCs).**
- a. Commandant (CG-0931) provides direction, information, training, and resources enabling the area performance management branch chiefs and OPCs to deliver relevant products, services, and processes. Commandant (CG-0931) provides program guidance to area performance management branch chiefs to plan and coordinate work at the organization level. In addition to annual funds provided in the Budget Model, Commandant (CG-0931) funds travel and materials for working on enterprise-level or Commandant-sponsored projects (SOP Section II).
 - b. Commandant (CG-0931) will establish a charter with the Leadership Development Center (LDC) for products and services required to support the OPC cadre. LDC shall develop curricula and materials and deliver training as described in OPC SOP Section VII.
 - c. Each area commander shall maintain an area performance management branch, assigned to the chief of staff or the resource and performance management staff. Area performance management branch chiefs shall oversee the OPC program in their AOR as described in the SOP Section III and shall ensure that Commandant and Leadership Council performance management initiatives and goals are carried out. Local implementation of those initiatives and goals will be left to areas and districts, employing their OPCs as appropriate. Area and district commanders will provide administrative support, including, travel orders; materials to work with commands and staffs; OPC leadership and management library and reference materials; computers and office supplies; training/conference funding/support to develop OPC skills, knowledge, and networks; and provide OPC-targeted Budget Model funds to ensure adequate resources to accomplish the purposes of this Instruction.

- d. Each OPC shall be under the administrative and operational control of his/her area or district commander. Administrative control may be delegated to the chief of staff, the resource and performance management staff chief, or the area performance management branch chief. With the exception of dual-role OPCs serving as the area performance management branch chief, no OPC shall be in a supervisory role over another OPC; this OPC-partner relationship is collegial and often mentoring in nature. The Headquarters OPCs shall be under the administrative and operational control of Commandant (CG-0931). OPCs administratively assigned to districts shall receive and follow programmatic direction and support from the area performance management branch chief. Generally, OPCs will, in consultation with their own area/district commander and staff chief, determine their workload emphasis, in keeping with area commander, program manager, and Coast Guard Leadership Council guidance. All OPCs shall balance their work between local, area, and program level priorities. It is advantageous to have both military and civilian OPCs working together as civilian OPCs provide program continuity over time while uniformed OPCs provide invaluable field perspective and experience.
- e. During OPC work with command and staff customers, confidentiality shall be maintained. Specifics about the products/services delivered and information obtained during work with each command or staff shall not be divulged to the chain of command. Themes, trends, or sanitized findings can and should be aggregated and presented to decision makers in the chain of command and for program evaluation.
- f. OPC primary products and services include, but are not limited to:
 - (1) Administering and/or analyzing assessments to determine current state performance levels; and analyzing/synthesizing data from CPEC-based assessments, the USCG Organizational Assessment Survey (OAS), climate surveys, management and employee interviews, observations, and Coast Guard Business Intelligence (CGBI) system performance and readiness data;
 - (2) Conducting CPEC workshops, training, and consulting;
 - (3) Gaining alignment with Coast Guard management policies, practices, and relevant plans;
 - (4) Providing AOR-wide assistance with the Coast Guard's Innovation Initiative and processes;
 - (5) Assisting commands/staffs to establish and use Coast Guard standard measures and CGBI;
 - (6) Enabling strategic planning and action planning;
 - (7) Supporting National Graduate School (NGS) student projects/efforts within their AOR;
 - (8) Encouraging and aiding process improvement;
 - (9) Performing high-level facilitation to support specific improvement efforts;
 - (10) Designing and delivering tailored products to assist command and staff customers to achieve their stated outcomes;
 - (11) Providing a repository of leadership, performance excellence, management, and facilitation tools, references, and resources, such as, book and video libraries.

6. **PROCEDURES.** Headquarters, area, district, and MLC senior leadership teams, program directors, staff chiefs, and unit command cadre are encouraged to solicit OPC assistance in their region to achieve the purposes stated in this Instruction. For assistance, contact OPCs directly; locate regional OPCs by visiting CG Central via the following path: **Communities: Find a Community: Browse for a Community: Expand (+) Command: Performance Management: Organizational Performance Consultants (OPCs).**
- a. District chiefs of staff (or delegate) and area performance management branch chiefs are responsible to provide OPC administrative support and coordination as outlined in paragraphs 5.b. and 5.c. In the event an OPC's performance does not meet expectations and performance plans, the local supervisor shall engage the area performance management branch and/or Commandant (CG-0931) to collaborate on actions required to improve job performance, take corrective action, or other supportive actions.
 - b. Area performance management branch chiefs are responsible to ensure that area, program, and Coast Guard Leadership Council goals are carried out by disseminating goals and guidance, developing area-wide strategies, and coordinating collaborative projects at area, district, MLC, and HQ units.
 - c. Commandant (CG-0931) is responsible for overall OPC Program administration and oversight, including:
 - (1) Program evaluation through analysis of customer satisfaction data, OPC activity data, and area performance management branch data summaries. Policy, funding, training, and/or guidance will be considered and adjusted accordingly;
 - (2) Work with area performance management branch chiefs, OPCs, and local supervisors to provide direction and guidance for annual program emphasis and organization-level projects. Provide annual direction in writing;
 - (3) Select/Solicit OPCs to work on projects of enterprise significance or OPC program objectives;
 - (4) Advocate for OPCs as needed. Work with incumbent OPCs, local supervisors, and military assignment officers to ensure motivated and well-suited individuals are assigned to open military billets. Provide guidance and support whenever hiring civilian OPCs is required. Commandant (CG-0931) will participate in the interview/hiring process for civilian OPCs and work with the Coast Guard Personnel Command for military OPC assignments.
 - (5) Provide input to local supervisors for OPC evaluations and performance review, as appropriate, based on any work an OPC performed for Commandant (CG-0931).
 - (6) Approval and oversight of the Training and Development process, course curriculum, and certification requirements for OPCs as delivered by the LDC.
 - d. Leadership Development Center (LDC), Coast Guard Academy is responsible to:

- (1) Train OPCs to deliver appropriate performance and management-related consultation, assessments, and interventions to Coast Guard command and staff customers. Develop/identify course outlines and materials for standard and consistent OPC use and delivery.
 - (2) Develop a standard curriculum focused on preparing mid-level Coast Guard people to lead leaders and teams to achieve the purposes of this Instruction.
 - (3) Serve as OPC focal point for CPEC-related issues, and for developing standard training materials to address Coast Guard-wide deficiencies/needs.
 - (4) Formally certify OPCs to perform duties in accordance with OPC SOP Section VII.
- e. Coast Guard military members who desire to fill an OPC billet may contact the program manager, Commandant (CG-0931) or the appropriate assignment officer for additional information. Interested civilian employees are encouraged to contact the program manager and look for position vacancy announcements for application opportunities.
7. ENVIRONMENTAL ASPECT AND IMPACT CONSIDERATIONS. Environmental considerations were examined in the development of this instruction and have been determined to be not applicable.
8. FORMS/REPORTS. None.

R. J. PAPP, JR. /s/
Chief of Staff