



**USCG Auxiliary District 11 North - Surface Operations Report  
November 2023**

To: COMO Curtis Han, District Commodore  
Jim Losi, District Chief of Staff  
District 11 North Board & Staff  
From: COMO Wally Smith, District Staff Officer – Operations (DSO-OP)

SEVERAL ITEMS ARE REPEATED FROM PREVIOUS DSO-OP REPORTS. THEY CONTAIN INFORMATION THAT WILL CONTINUE TO BE RELEVANT NEXT YEAR. IT IS SUGGESTED THAT SECTIONS OF INTEREST BE CLIPPED AND RETAINED AS THEY WILL MOST LIKELY NOT BE INCLUDED IN NEXT YEAR’S REPORTS.

This report covers D11N surface activities for the month of October 2023.

**HIGHLIGHTS**

1. OPTREX Calendar
2. Minimum Hours Required
3. Initial qualification information
4. OPTREX / Funding planning – 2024
5. “Night Certification” QE Check-Rides
6. Qualification Check Ride Due Dates
7. BONUS MATERIAL

**DETAILS**

1. OPTREX Calendar  
It is not too early to schedule your 2024 OPTREX – get the dates on the District Calendar!  
Scheduled dates are reflected below:

**OPTREX CALENDAR - 2024**

<u>Division</u>	<u>Location</u>	<u>Dates</u>
3	Sacramento Yacht Club	01 June
11	Lake Tahoe	26-27 July
6	Santa Cruz	06-08 September

2. From COMO Michelle Thornton, Division Chief - Surface Operations (DVC-RS):  
Passing along the answers to questions that have come up a couple of times:
  - There are NO LONGER required hours for initial boat crew qualification. This was part of the Qualification Handbook changes.
  - There are still minimum hours required as a certified boat crew to become eligible for COXN QE.



- There are annual currency maintenance hours that apply but not hours for initial crewmember qualification.
3. **Initial qualification information:** Per ALAUX 003/23, Auxiliary members that have started the qualification process prior to the release last March of this ALAUX, as either a crewmember, coxswain, or PWC operator, are authorized to transfer applicable “TASKS” from the prior Qualification Handbook and continue the qualification process using the new Auxiliary Boat Crew Qualification Handbook, ABQH 16794.52B.
  4. The following was emailed to all DCDRs and SO-OPs on 29 September:  
Our OTO, BOSN Perez, is planning ahead for funds to be allocated from next year’s (2024) budget for OPTREXs and coverage by QEs. To that end, he will need at least a preliminary schedule of OPTREXs sooner rather than later. We have roughed out a very preliminary 2024 calendar based on the last three years' Division OPTREX dates ... a copy is attached. This is a very tentative offering with only Divisions 6 & 11 events locked in on the District calendar. The assigned dates on the schedule are based on prior years and the lower portion of the document lays out that history. Of course, all dates are adjustable as are the venues ... this merely gets something started 'on paper' for planning purposes. DCDRs and SO-OPs, please start thinking about your OPTREX dates now, although there will be some turnover of officers now that the election season is upon us, please get the ball rolling.

Once a Division’s OPTREX date is selected, please reserve the date on the District calendar by running it first by our CQEC Angelo Perata and, predicated on his OK, the request should be routed to DCOS Jim Losi so that the event may be added to the calendar. No two OPTREXs will be scheduled for the same weekend simply because there may be a sizeable number of candidates and multiple QEs may be already committed. A reminder ... the schedule is “preliminary” and both the date and venue may be changed as long as it does not conflict with another planned event. No OPTREXs will be scheduled after 08 September 2024.

**If a Division’s OPTREX date has not been selected by the end of February 2024, a date will be assigned by the OTO, CQEC, and DSO-OP. Again ... this is for planning purposes for funds allocation and QE assignments. The assigned date and venue may be altered if it doesn’t work for the Division but in no event, as stated above, will it be booked on a date that is already assigned.**

In addition to the “Weekend” dates and “Probable Location”, the attached form also includes columns as follows: “# of Candidates due in ‘24”, “Additional Candidates Anticipated”, and “# of QEs”. Please provide the following information for each of the columns:

- “# of Candidates due in ‘24” – the number in the column is the total requalifications due in 2024 based on AUXDATA II as of 11 September. Please take a close look and let us know of anyone on the 2024 list who will be dropping out of the boat crew program.
- “Additional Candidates Anticipated” – please indicate the number of expected initial qualification candidates. “# of QEs” – please leave blank.



Should a boat crew member decide not to attempt requalification and leave the surface operation program, please let me know so that we can maintain an accurate record. Also, please endeavor to collect any PPE in their possession and return it to DIRAUX.

5. "Night Certification" QE Check-Rides (repeated from August DSO-OP Report)  
Per the following excerpt from the **Auxiliary Qualification Handbook (AQH)** for Crew:
  - *For candidates wanting to be "Night Certified" Performance Criteria #7, #8, and #15 must be part of the check-ride conducted at night. (Reference 1)*
  - From the **Auxiliary Qualification Handbook (AQH)** for Coxswain:  
*For candidates wanting to be "Night Certified" Performance Criteria #7 and #15 must be part of the check-ride conducted at night (Reference 2)*

Thus "Night Certified" is an option on an initial check ride depending on whether or not the candidate wants to be night certified.

Regarding "Recertification", in checking the **Auxiliary Training Handbook (ATH)**, there is no requirement for a night check-ride for recertification on a third-year QE check-ride (Reference 3). If the recertification candidate has completed the prior year's Annual Task Tracker (Reference 4) with the optional night exercises signed off, that would certify them for night certification upon successful completion of a "day" check-ride. If the Annual Task Tracker sign-offs did not include the night exercises, then the candidate would be recertified for "day" operations only.

Important: It is necessary for OPTREX organizers to be notified well in advance if an initial qualification candidate(s) "wants" to be night certified so proper arrangements may be made by the QE(s).

References:

- (1) AQH - Underway Check Ride Pages 2-85 & 86
- (2) AQH - Underway Check Ride Pages 3-74 & 75
- (3) ATH - Underway Currency Maintenance / Recertification Check Ride Enclosure 1 (Crew Member) & Enclosure 2 (Coxswain)
- (4) ATH - Annual Currency Maintenance Task Tracker, Crewmember (Enclosure 3) and Coxswain (Enclosure 4)

Additionally, a current PPE annual certification will be required for all candidates and it must be entered in ADII.

6. An updated CHECK RIDES DUE DATES Report is posted on the District webpage ... go to "Response", then "Surface Operations". Currently due for requalifying are 13 members in 2023 (7 are in REYR/REWK status), 51 members due in 2024, 62 members due in 2025, and 15 members due in 2026 (requalified this year) for a total of 141 members. Please keep in



mind that certification expires at the end of the year and not on the anniversary date of the last qualification/requalification check ride.

7. BONUS MATERIAL – at the end of the Report

## Division Reports

(Includes some editing for accuracy & brevity)

### Division 1

From Nancy Marion, SO-OP

#### Highlights

1. Surface Operations-OCT 2023
2. OPTREX Planning

#### Details

1. Surface Operations-OCTOBER 2023: COX Terry Blanchard on OPFAC SILVER CHARM had seven patrols in October: Four patrols in support of Fleet Week as the Red Tarp Boat, and three Helicopter Ops patrols. A hearty BZ to COX Blanchard for organizing all OPFAC participation for Fleet Week 2023. See attached photos.

COX Peter Shamray on OPFAC SEAHORSE had orders for fleet week support but had to cancel due to a mechanical issue.

2. 2024 OPTREX Planning: July 20 and 27<sup>th</sup> have been approved by the Division Board as tentative dates for the 2024 OPTREX. These dates have been forwarded to Head QE COMO Angelo Perata for approval. Upon approval, requests will go out to D11N to place them on the District Calendar and to USCG Station San Francisco for approval.

#### Goals:

- Rotating members into training patrols for OPTREX preparation and building underway hours.
- Providing training opportunities for our current crew members and initial qualification candidates.



**Fleet Week 2023: OPFSC SILVER CHARM & United Airlines 777. Photo credit Tiffany Townsend.**



**Fleet Week 2023: OPFAC SILVER CHARM & Blue Angels. Photo credit: Tiffany Townsend**



### **Division 3**

From John Hardin, SO-OP

No report submitted.

### **Division 4**

From Paul Verveniotis, SO-OP

No report submitted.

### **Division 5**

From Lew Derfuss, SO-OP 5

Much of our patrol activity has been limited due to budget issues. AUDREY L and KOKUA II continues to support Night Helo Air Ops on Thursday Nights.

Thanks to the outstanding performance from many members of both Flotilla 5-1, 5-2, 5-3, 5-3 we have been able to complete training and now relieve Station Vallejo from this task to pursue other duties.

BRAVO ZULU!! to the crews supporting Helo OPS Tom Hurley, John Albrecht, Lew Derfuss, Bill Malloy, Randy McCormick, Larry Kubo, Eric and Dina Paananen, along with Trainees Luciano Salzano and Mary Kraybill. Truly a division 5 Team Effort

Fleet Week was a success. Division 5 supplied 3 of 7 AUXFACS Bucket List KOKUA II and Great White and crews, with two AUXFACS patrolling all 4 days and the other for 2 days SAR DOG II did not get on the list in time so was excluded. BRAVO ZULU to Coxswains Tom Hurley, Mike Hay, Randy McCormick, Thomas Herbst and Lew Derfuss, along with Crews Ron Nathan, Eric and Dina Paananen, John Albrecht, Larry Kubo, Frank Capurro, Bill Malloy, Morgan Curtis, Steve Kilgariff, Threase Vanwiellie, Doug Twitchell, Jim Mathies We also had Trainees Alvin Cura, Randy Saxe, Mary Kraybil and Jonathan Goodart, along with our OIC Lt Jankelow on Sunday.

Tom Hurley has taken the lead on asking for anyone interested in attending a Boat Crew Academy at a date to be developed. This will help those interested in initial boat crew or Coxswain, as well as those due three-year requalification to prepare for QE check rides. I can attest by firsthand experience that the new standards are tough and you must be prepared to be successful. If you are interested, please send email to Tom Hurly and Lew Derfuss so we can get you on the list. Anyone interested in Boat Crew Operations or getting patrol time please advise Lew Derfuss SO-OP 5 with your contact information and I will try to find slots on upcoming patrols as space allows. Additionally, Tom Hurley FL 51 has been conducting patrols on Audrey L -so more opportunities. With our Operational Fleet of AUXFAC's Coxswains and Crews we need to work together to maximize opportunities and fill our AUXFAC on as many patrols as possible. Flotilla 53 sometimes have some open opportunities for crew and trainees.



### **Division 6**

From Mark McLaughlin, SO-OP  
No report submitted.

### **Division 7**

From Paul Brown, SO-OP  
No report submitted.

### **Division 8**

From Dave Johnson, SO-OP  
No report submitted.

### **Division 10**

From Doc Pierce, SO-OP

- **FLOTILLA REPORTS:**
  1. **MODESTO, FRESNO AND VISALIA:**  
CONDUCTING MOM AND ATON VERIFICATION PATROL WITH MEMBERS FROM 3 FLOTILLAS. ORDERS HAVE BEEN ISSUED FOR 4 NOV.
  2. **STOCKTON:** NOTHING REPORTED
  3. **CREW/COX'N:** TRAINEES ARE BEING INCLUDED WITH ALL OPERATION ACTIVITIES. NEW STANDARD REQUIREMENTS ARE BEING USED TO READY EVERYONE FOR QUALITY AND CERTIFICATIONS.
- **FACILITIES:** ONLY HAVE 1 FUNCTIONAL FACILITY AT THIS TIME
- **INSPECTIONS:** BEING CONDUCTED FOR ISSUED EQUIPMENT

### **Division 11**

From Bill Stolz, SO-OP  
No report submitted.

### **Division 12**

From Jim Losi, SO-OP

#### **HIGHLIGHTS**

- **DIV12 Surface Operational OPFACS & STATUS**
  - A. Div 12 OPFACS\* are:
    - (a) SERVANT
    - (b) OPFAC SERVANT has conducted four patrols during the month of October. All were related to and in support of SF Fleet Week:
    - (c) The following is a listing of the crew members who served on OPFAC SERVANT for all four days:



**2023 San Francisco Fleet Week**

**OPFAC SERVANT - Crew Information**

<b>Name</b>	<b>Membership</b>	<b>Flotilla</b>	<b>Role</b>
Steven George Bustin	1228253	113-01-04	Coxswain
Gregory Todd Olsen	1249522	113-12-91	Coxswain
James Garret losi	1231981	113-12-91	Coxswain
Adam Paul Kovalevsky	3010789	113-12-91	Boat Crew
Morgan James Swiggett	5000504	113-12-91	Boat Crew

(d) Morgan Swiggett is in the process of procuring a boat and rendering it an OPFAC.

(i) Morgan is in the process of having the stale gas pumped out of his boat and a mobile mechanic to start the engine after three years of nonuse.

B. Coxswains in Div 12 are as follows:

- (a) Greg Gleeson, 113-12-91
- (b) Greg Olsen, 113-12-91
- (c) Jim Losi, 112-12-91
- (d) Morgan Swiggett, Coxswain in Training

- Only Greg Olsen and Jim Losi have been active coxswains.

- We are tentatively scheduling a miniOPTREX during the month of January 2024 for two coxswain check rides and two initial check rides of boat crew.

- **2023 Goals and Objectives**

- a) Terry Blanchard and I have discussed and started planning regularly scheduled two-boat training. We would like to have at least one patrol per month where training takes place.
- b) We would like to have guest rides for prospective new members to the Auxiliary and for existing members who wish to join boat crew operations.
- c) Operational Activities:
  1. PATON Patrols
  2. Fleet Week – West TARP Boat
  3. Kite Surfer Safety Patrol with Station Golden Gate
  4. Training – Div 12 members with a focus on new boat crew members
  5. Joint Training with Station Golden Gate and Station San Francisco
  6. Joint training with Active Duty Reserve (May)
  7. Engage in general MOM/Training patrols on a regular basis





8. Joint training with the small boats attached to the PACAREA Cutter Forces group.

### **Projects**

- Check Ride Program for coxswains and boat crew members and trainees
- Recruiting members with prospective OPFACs

### **Future Activities**

- Running maintenance on OPFAC SERVANT

### **Challenges**

- Allocation of time with only one OPFAC and many requests
- Demands from members requesting check rides earlier in the year rather than the 4Q21.

### **Goals and Objectives**

- Get as many members as possible ready for their check rides.
- Training excellence and mission excellence.

\*\*\* END OF REPORT \*\*\*

Respectfully submitted,  
COMO Wally Smith  
DSO-OP

**SEMPER GUMBY!**



**BONUS MATERIAL (see below)**



**“OBJECTS IN MIRROR ARE CLOSER THAN THEY APPEAR”**