



17 August 2012

MEMORANDUM

From: Kelly L. Townsend, DIR-V

Reply to: DIR-V

To: All Vessel Examiners, FSO-VE, SO-VE, DSO-VE
V-Department National Staff

Subj: NEW "I WANT A VSC" INQUIRY SYSTEM

Ref: (1) *New National V-Department Website*, DIR-V, 17 August 2012

In conjunction with the rollout of our new V-Department website, we have implemented a new "I Want a VSC" System, based upon the successful model used by the H-Department for new member inquiries. This memorandum describes the operation of that system, and how Vessel Examiners are expected to respond to inquiries.

Background

The national Vessel Examinations & Recreational Boating Safety Visitation ("V") Department, at its venerable "safetyseal.net" website, has for years presented the boating public the opportunity to find a vessel examiner in their locale, by entering their Zip Code, and a distance. The system would then generate a list of nearby examiners, by name, sorted by distance, and a "Click to Email This Examiner" link. Many of you, and your fellow examiners in the United States Power Squadrons (USPS), have received vessel exam inquiries from this system.

Although simple to describe, the maintenance of this system required a prodigious amount of work in the background to keep it running, such as weekly manual updates of the VE database via dumps from AuxData and the USPS, manual maintenance of an opt-in, opt-out list, and personal follow-up by designated national staffers of appointment requests sent to you that were never answered – a considerable number, over the years.

This latter has been particularly troubling, because the "I Want a VSC" website sets the expectation in the mind of the public that when they click the link to schedule a VE, that somebody will actually call them back. When that doesn't happen, the entire organization looks bad.

New "I Want a VSC" System

The new system operates on a different principle. Instead of presenting the visitor with a list of examiners to choose from, it simply goes ahead and finds the five (5) nearest examiners, based upon their address of record in AuxOfficer/AuxDirectory, and sends them *all* a "VE request" email, providing requestor contact information and the general location of the boat.

Any one of you receiving the request is free to respond to it. The only requirement is that when you do, "Reply ALL" so that your response is emailed to the other four contacted examiners, to let them know that you are on the case. Additionally, if something comes up, you can use the same technique to quickly get one of the other four to cover for you. A sample email is shown on Page 4.

While the five examiners email addresses are the only ones to appear in the email headers, the FSO and SO in each examiner's parallel chain are copied. Each flotilla and division can determine for themselves what additional oversight they wish their officers to apply to the process, but our recommendation is a "light touch". It will be the extremely rare case where at least *one* of the contacted VEs does not aggressively go after the opportunity, and so the FSOs and SOs should simply treat the requests they are copied on as an "FYI".

That having been said, the SOs' name and email addresses are also listed in the *body* of the email as the ultimate fallback person for the requestor to contact. The theory here is that if *all five* contacted examiners ignore a VE request, then something is out of whack, and worthy of higher-level attention. More than one SO may be listed if the examiners fall into neighboring divisions (or even districts).

A summary of the process is outline in Table 1, on Page 4. Questions and answers follow.

Questions & Answers

Q: How does the system determine if I am one of the "nearest five (5) examiners"?

A: Each Zip Code in the U.S. and its territories has an official latitude and longitude, and the direct distance between two such coordinates ("as the crow flies") is an easy calculation. *Your* Zip Code is taken in real time from AuxOfficer (AuxDirectory), and the requestor's location is taken from validated information from the online form that they fill out.

Q: I am listed as the nearest examiner, but the Mississippi River is in the way, and the nearest bridge is 40 miles. What do I do?

A: Use common sense. Let one of the other listed examiners across the river take the request. Unfortunately, our IT group, which wrote the system, has not yet been able to find a "distance via road" online database. However, these extremely rare cases are only problematic if *none* of the five examiners are on the correct side of the river (or other natural barrier), in which case the SO gets to help the requestor find an examiner.

Q: I am listed fifth in the email, as the furthest examiner. Do I have to wait for the others to respond?

A: No. The "early bird gets the worm". The approximate distance (as the crow flies) is shown on the request email, and if driving that is OK with you, it is OK with us.

Q: How do I let the other four (4) examiners know that I have contacted the requestor?

A: Simply hit "Reply ALL" in the request email, and say "*I have contacted Mr./Ms. Xxx and we are scheduled for a VSC on <date> at <location>*". You follow this polite and informative format because the requestor will also get a copy of your reply to your shipmates.

Q: I don't have a computer or email. Will I be listed as a nearby examiner?

A: No. The system ignores vessel examiners who don't have an email address. You'll have to get your vessel examinations in the old fashioned way: participate in blitzes, walk the docks, meet people at Public Affairs events, etc.

Note that in the Auxiliary, where you can have a second email address listed in AuxData, only "Email 1" is used.

Q: I don't want to participate. How do I opt out?

A: You can opt yourself out by logging onto AuxOfficer/AuxDirectory at <http://auxofficer.cgaux.org>, and looking yourself up. In the middle of the page is a list of opt-in/opt-out choices ("YES" "NO"). Simply set "Opt out of 'I Want a VE' Program" to "YES". The change is instantaneous, and you can immediately close your browser.

Q: Why are the U.S. Power Squadrons members getting "our" VSC requests?

A: Both the USPS and the Auxiliary are committed to boating safety. We've had a longstanding Memorandum of Agreement with the USPS that we will cooperate on Vessel Safety Checks, and our previous system has listed both Auxiliary and USPS examiners for years. It was just not as obvious, since only one examiner ever received the VE request.

Q: I called the requestor, and she told me another VE had just set up an appointment with her. What a waste of my time!

A: That's great! At least two on you are on the ball. In such a situation, be gracious on the phone with the requestor, and say "*Excellent news! We just wanted to make sure you are covered*". Or something like that. And then, hit "Reply ALL" on the email and say "I contacted Ms. Doe, and she informed me that she was all set up with John. Thanks, John..." The key in all of this is *communication*. Talk to one another.

Q: My flotilla’s FSO-VE says only *she* can assign examiners to examinations, and that we are “Not allowed to respond to these requests.”

A: Your FSO-VE is exceeding her authority. She is certainly free to proactively organize and manage VE events using your flotilla’s or division’s resources, but *any* currently qualified vessel examiner, Auxiliary or USPS, may respond to a spontaneous request by the public – whether through this system or otherwise – for a vessel safety check.

Q: I set up an appointment with the requestor, and then learned I had just gone “REYR”. What do I do?

A: The system uses currency information from AuxOfficer, which is updated weekly (on Mondays) from AuxData. It is possible (but extremely unlikely) that a contacted VE will go REYR in that narrow one-week window, but if it happens to you, just use common sense. Use the request email as a source of the email addresses of the other four examiners, and *privately* send them an email asking for one of them to cover for you. Continue to follow up with the substitute examiner *and* the requestor until you are sure that a new appointment has been confirmed.

If this fails, then ask the FSO-VE or SO-VE for assistance.

Q: I’m going on a six-week cruise, and won’t be able to answer my emails. What do I do?

A: You also won’t be able to perform any vessel examinations. Give everyone a break and “Opt out” in AuxOfficer/AuxDirectory while you are gone.

Q: I discovered I’m not getting request emails even though I live zero miles from some requestors.

A: 99 times out of 100, this will be because your address or email address is wrong in AuxData, hence in AuxOfficer/AuxDirectory. Browse to AuxOfficer as described above, and look yourself up. Make sure that *both* your city and Zip Code are correct, and make sure that your email #1 address is accurate. If either are wrong, click on the appropriate button on that page and correct the information.

In the rare event that you can confirm an actual bug in the software, use the National Help Desk (<http://help.cgaux.org>) only, and submit a ticket in the “C-Computer Software & Systems” category. Software bug reports are *not* to go through the Chain of Leadership or parallel chain.

Explain what system you were using, provide copies of the emails, your member ID, canonical flotilla number (e.g., 114-12-43), and any other information or clues that will help a software engineer. The system was developed by our National IT Group.

Q: I’m an SO-VE and am getting copied on all the emails to vessel examiners and their replies in my division. How do I stop these?

A: The most requested thing we hear from SOs all around the country is a plea for “visibility” on what is going on. Now you have it, and an opportunity to step in and help in the rare event that nobody right at the deck plate responds to a request.

To manage your email, we recommend that in your email “client” (Outlook, Thunderbird, Yahoo, AOL, Google, etc.), you set up a separate folder called “VSC Requests & Replies” and create a mail routing rule to look for the subject “Request for Vessel Safety Check”. That rule can then be set to route all of this traffic directly to this folder, instead of to your Inbox. You then can examine it – and know exactly what is going on – at your leisure.

Table 1 – Procedural Summary

If you receive a "Request for Vessel Safety Check" email from the VSC System "mail robot", and you wish to respond, proceed as follows:

- Telephone the requestor, and set up a date.
- Back up your telephone call with a confirmation email, by using Reply ALL on the original email, and adding your confirmation information (date, time, contact info, etc.).
- If you get voice mail, leave your reason for calling, and your call back information. Also inform the other four VE's via "Reply ALL" with the request email, that you have "left a message."
- Perform the vessel exam as scheduled.
- If you have to cancel, find the requestor a substitute starting first with the other four examiners in the original request.

In all cases, *communicate* what you are doing, be courteous to all, and use common sense.

Figure 1 –Sample Email

To: John Doe (USPS) <john.doe@gmail.com>;
Richard Johnstone (CGAux 095-41-04) <rjse@aol.com>;
Mel Belli (USPS) <lawyer1@sbcglobal.net>;
Charles Scott (CGAux 095-41-04) coxn@sbc.net>;
Jane Docent (CGAux 095-41-04) jd2345@gmail.com
CC: C. Lorentz (SO-VE 095-41) transform@yahoo.com;
Isaac Newton (FSO-VE 095-41-04) <apple.guy@ouch.uk>
From: mail-robot@cgauxnet.us
Subject: Request for Vessel Safety Check

Vessel Examiners: The individual below has requested a vessel safety check using the joint Coast Guard Auxiliary/U.S. Power Squadrons "I Want a VSC" system. You are the 5 closest examiners.

Any one of you may respond to set up an appointment, but if you do, you MUST "Reply ALL" to this message indicating to the others that you have done so. Thank you for your service to the public and to our organization.

Requestor:

Dobinston Cumskaves
Ingleside, IL 60041
Email: highconceptpr@yahoo.com
Phone: (650) 555-1212

Location of vessel: Ingleside, IL 60041
Requestor CAN bring vessel to examiner.

Nearest 5 examiners within 30 miles (as the crow flies):

John Doe (USPS) (0 miles)
Richard Johnstone (CGAux 095-41-04) (0 miles)
Mel Belli (USPS) (3 miles)
Charles Scott (CGAux 095-41-04) (3 miles)
Jane Docent (CGAux 095-41-04) (3 miles)

This inquiry has simultaneously been sent to these department heads as an FYI:

Isaac Newton (FSO-VE 095-41-04)

Dobinston Cumskaves: If no response in 72 hours, please follow up with the individual below (also copied):
C. Lorentz (SO-VE 095-41) transform@yahoo.com

Thank you for your interest in boating safety!

/s/ Kelly L. Townsend, DIR-V

Copy: DNACO-RBS, ANACO-RB, ANACO-IT, DIR-B, DIR-C, DIR-U, DVC-UM