



# Surface Warfare Officer Spouse Brief

**PERS 41**



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Assignments (PERS-41)



# Thank You

- Surface Warfare is a family career choice
- Your service is as important as your spouse's



We recruit Sailors ... We retain Families!



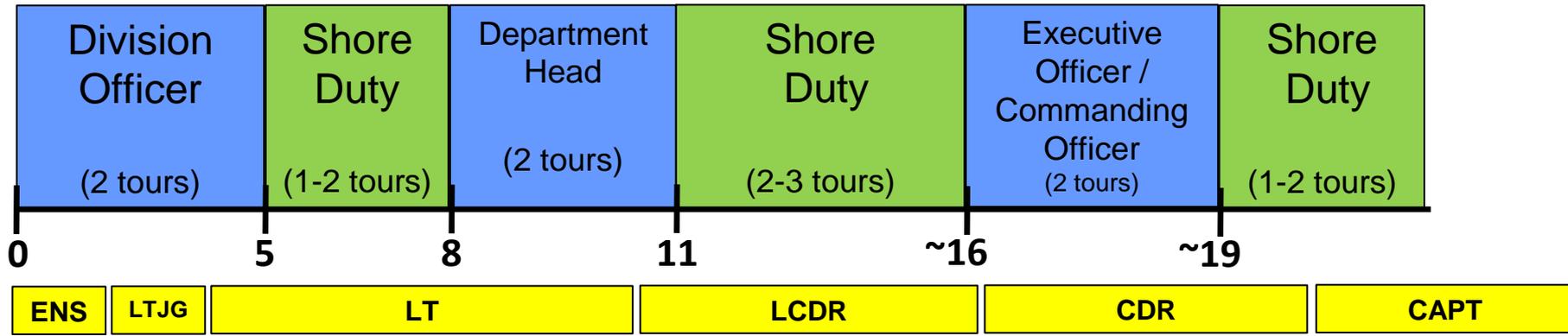
# SWO Career and Family

- Career Path
  - Sea/shore rotation and milestones
  - Timing
- Opportunity
  - Promotions
  - Graduate Education
- Compensation
  - Bonuses
  - Post-9/11 GI Bill
  - Retirement



# Career Path

## Notional Timeline



- A typical SWO spends about half of a career on sea duty
- Multiple sea tours of increasing responsibility/rank
- Shore schools & experience influence future sea & shore billets
- Performance drives selection and opportunity in assignments
- Billet choices designed to keep your spouse “upwardly mobile”



# Detailing Triad

- Homeport/Ship Type/Billet
- Deploying Ship
- Geographic Stability
- Graduate/JOINT Education
- Family Needs

**Personal Preferences**

**Career Needs**

- Qualifications
- Timing for Screening
- Career Progression
- Assignment Diversity

**Needs of the Navy**

**“Deliver the Right Skills, at the Right Time, for the Right Job”**



# Promotions

- Surface Warfare Officers compete with other Unrestricted Line
  - Selection percentage and timing set by law
  - Promotion numbers controlled by changing eligibility zone
- Competitive due to high retention / low attrition
- Promotion Boards conducted annually for each rank
  - Board Membership includes all Unrestricted Line
  - Selects the “best and fully qualified” for promotion

SWOs historically promote at or above board selection average



# Keys to Promotion and Screening

- Department Head screening: Performance in Division Officer tour
- Lieutenant Commander promotion: Serve successfully as a Department Head
- Commanding Officer/Executive Officer/XO-Special Mission screening
  - Fully Qualified
  - Superior performance as a Department Head
  - Post-Department Head jobs matter
- Commander Promotion: Select for a career milestone
  - Commanding Officer Afloat
  - Executive Officer Afloat
  - Executive Officer Special Mission
  - Specialty Career Path Executive Officer/Commanding Officer
- Captain Promotion: Successful Commander Command tour



# Graduate Education Opportunities

- Naval Postgraduate School
  - Over 20 Masters degree programs
  - Full time education
- SWO 24/12 Program
  - Part-time student for 24 months while instructing at Afloat Training Group/ Dahlgren / Surface Warfare Officer School (SWOS)
  - Provides one year as full-time student to finish degree
  - Graduate Education Voucher (GEV) funded
- USNA Leadership Education and Development (LEAD)
  - 1<sup>st</sup> year – Masters in Leadership from George Washington University
  - 2<sup>nd</sup>/3<sup>rd</sup> year – Company Officer
- USNA Grad Ed + Teaching
  - 1<sup>st</sup> year – Masters at a university near Annapolis
  - 2<sup>nd</sup>/3<sup>rd</sup> year – USNA Instructor in the field of study
- Tuition Assistance
- Junior/Senior War Colleges
  - Joint Professional Military Education
  - Masters Degree

**Graduate Education Payback: 1.5 years for every year of paid education  
Runs concurrent to any other commitment (i.e. SWO Bonus Payback)**



# Critical Skills Retention Bonuses

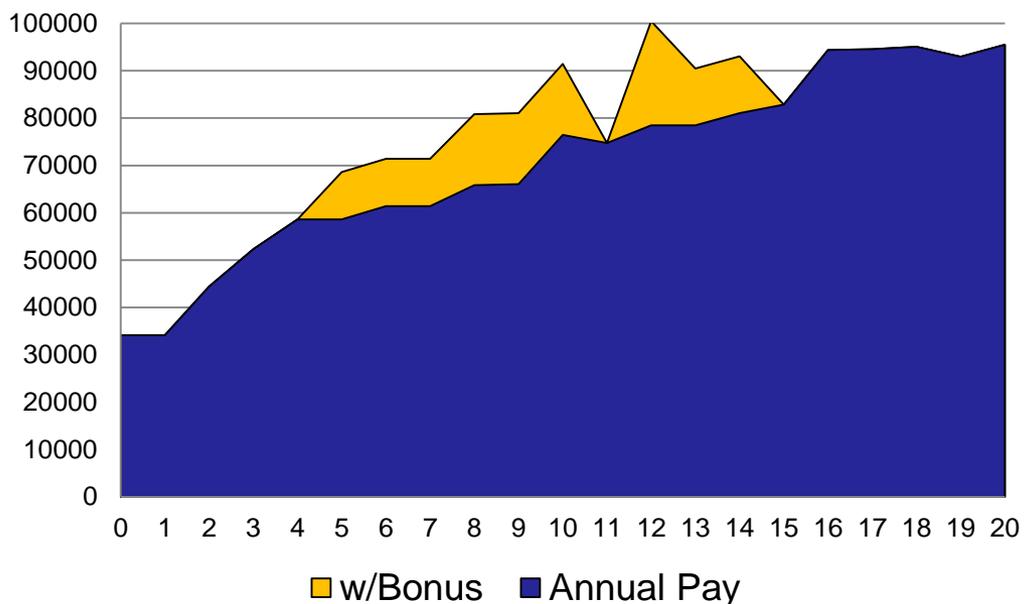
## Junior SWO CSRB – \$75K

- \$10K upon commitment and confirmation of eligibility
- \$10K on 6<sup>th</sup> and 7<sup>th</sup> anniversary of commissioned service
- \$15K on 8<sup>th</sup>, 9<sup>th</sup>, and 10<sup>th</sup> anniversary of commissioned service
- Requires commitment to 2 Department Head tours, or 10 years of commissioned service (whichever comes later)

## SWO CSRB - \$46K

- \$22K on 2<sup>nd</sup> anniversary of promotion to LCDR
- \$12K on 3<sup>rd</sup> and 4<sup>th</sup> anniversary of promotion to LCDR
- Requires an additional 3-year commitment

### SWO Compensation



**\$121K to Serve DH + 4 Years as LCDR!**



# Other Financial Benefits

- Health Care Benefit
  - \$2000-3000/year after taxes (based on 2005 RAND study)
- Commissary Privilege
  - Savings on overall purchases consistent at 31.5%
  - Average family of 4 that consistently uses the Commissary will save approximately \$4,400/year (Congressional testimony 10 Feb 2011)
- Navy Exchange
  - Average savings of 22% not including tax savings (Oct 2011)
- Morale, Welfare, and Recreation (MWR) Programs
- Housing

# Post-9/11 GI Bill Highlights

## Eligibility:

- Served 90 days active aggregate duty post-9/11
- Full benefits available after 36 months of qualifying service
- USNA / NROTC graduates: qualifying start date follows completion of minimum service requirement

## Active Duty Benefits:

- Full tuition and fees
- Up to 36 months of benefits
- Monthly tutoring funds available for qualifying officers

**Check your status!** Visit <https://www.dmdc.osd.mil/milconnect>

Visit the NPC Post-9/11 benefits page at <http://www.public.navy.mil/bupers-npc/career/education/GIBill/Pages/default.aspx>

## Transferability to dependents:

- 4 years of additional service REQUIRED (exemption policy expired AUG 2013)
- Exceptions:
  - Already have 10+ years of qualifying service and will be separated from service by policy or statute. Must then continue service to mandatory separation.

**Service obligation will be incurred. Refer to NAVADMIN 203/09 for details and admin requirements**

- **The Dept of Veteran's Affairs administers / manages the Post-9/11 GI Bill.**
- **Department of Defense manages the transferability provision.**

**GI Bill transferability is a powerful retention incentive**



# Retirement Compensation

For a married Lieutenant, age 26, at 4 years service...

Annual pay(including BAH/BAS): \$78K

***Equivalent starting salary*** to maintain lifestyle: \$89K\*

Retirement (paygrade @ YCS)	O-4 @ 20 (Retire at 42)	O-5 @ 20 (Retire at 42)	O-5 @ 25 (Retire at 47)	O-6 @ 25 (Retire at 47)	O-6 @ 30 (Retire at 52)
Annual retirement pay (assumes 2%/yr annual increase)	\$60K (50% base pay)	\$69K (50% base pay)	\$98K (62.5% base pay)	\$114K (62.5% base pay)	\$162K (75% base pay)
Total retirement equivalent (assumes member lives to age 79)	\$3.25M	\$3.72M	\$4.33M	\$5.05M	\$5.73M
Annual investment required to achieve equivalent retirement (assumes 5% APY til retirement)	\$47.8K	\$54.8K	\$48.6K	\$56.8K	\$51.3K
<b><i>Annual compensation</i></b> required to achieve equivalent retirement**	\$136.9K	\$143.8K	\$137.6K	\$145.8K	\$140.3K

\*Based on OSD Military Compensation Calculator for a LT (family of three, avg BAH)

\*\* Annual compensation accounts for civilian equivalent pay and required annual investment to amount to the same annuitized payout from the military retirement system.



# Frequently Asked Questions

- When will my spouse receive his/her orders?
- What are the requirements for overseas screening?
- My spouse and I have an Exceptional Family Member. What are the restrictions on where we can be stationed?



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## Questions and Answers

