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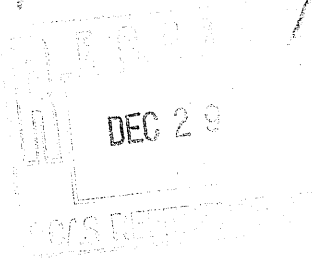
Department of the Army
Pamphlet 623-105

REFERENCE
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Personnel Evaluation

The Officer Evaluation Reporting System "In Brief"

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DEPARTMENT OF THE ARMY
PAMPHLET 623-105

THE OFFICER EVALUATION REPORTING SYSTEM "IN BRIEF"

Page

OVERVIEW OF NEW FEATURES 2

DA FORM 67-9-1 (OER SUPPORT FORM) 4
Front Side 6
Reverse Side 8

DA FORM 67-9-1a (JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM) 10
JUNIOR OFFICER DEVELOPMENTAL PROCESS 12
Front Side 14
Reverse Side 16
COUNSELING PROCESS 18

DA FORM 67-9 (OFFICER EVALUATION REPORT)
Part I, Administrative Data 20
Part II, Authentication 20
Part III, Duty Description 20
Part IV, Performance Evaluation - Professionalism 22
Part V, Performance and Potential Evaluation 24
Part VI, Intermediate Rater 24
Part VII, Senior Rater 26

HQDA LABEL 28

BATCH PROCESSING 30

DA FORM 67-9-2 (Senior Rater Profile Report) 32

SENIOR RATER RESTART RULES 32

OFFICER PERSONNEL MANAGEMENT SYSTEM INTERFACE 34

SENIOR RATER TIPS (inside back cover)

In March of 1995 the Chief of Staff of the Army directed adjustments be made to the Officer Evaluation Report (OER) to reflect the challenges of a smaller, high quality post drawdown Officer Corps. The vision is to take an "evolutionary step" to improve, rather than radically change or remake the existing system. Accordingly, the new Officer Evaluation Reporting System (OERS) resembles the previous system in many respects. However, there are several changes in the new OERS which enhance the way we as an Army mentor, develop, evaluate, and ensure a level playing field for our officer corps.

OVERVIEW OF NEW FEATURES

- **Support Form Reinvigoration** - Requirements designed to enhance leadership communication from the top down. Senior raters will ensure all rated officers receive a copy of the rater's and senior rater's support form shortly after assuming duties. (Description/example, pages 6-9)

- **Company Grade Officer Leader Development** - Mechanisms to assist in the Army's commitment to ensure a rapid, equal, and fair transition of junior officers into the Army culture, and provide a common developmental framework based on Army values and leadership doctrine.

  – **Junior Officer Developmental Support Form** - A mandatory support form worksheet for LTs/WO1s on which developmental tasks in doctrinal leadership actions and mandatory quarterly developmental counseling summaries are recorded. (Description/example, pages 14-17)

  – **Regular Follow-up Performance Counseling** - Requirement for quarterly face-to-face performance and developmental counseling for all LTs and WO1s. (Description/example, pages 18-19)

  – **Masking of Lieutenants Reports** - Removal of all 2LT evaluation reports from an officer's Official Military Personnel File (OMPF) upon promotion to CPT. (USAR - selection to promotion for CPT.)

- **Rater Evaluation Upgrade** - Use of rating criteria to enhance officer corps familiarity with doctrinal Army values and leader attributes/skills/actions, thus emphasizing and reinforcing the desired behavior that epitomizes the officer corps.

  – **A rater developed "leader word picture"** consisting of checking several boxes representing the rated officer's strengths and providing prose narrative comments based on Army doctrinal leader attributes/skills/actions. (Description/example, pages 22-23)

  – **Focus on doctrinal Army values** as a foundation of officer corps performance.

  – **Emphasis on rated officer compliance with Junior Officer Developmental Support Form requirements**. (Description/example, pages 22-23)

  – **A block which identifies any unique skills/expertise** that an officer possesses of significant value to the Army. For Army Competitive Category CPTs - LTCs, indicate potential Career Field for future service (OPMS XXI). (Description/example, pages 24-25)

- **Senior Rater Evaluation** - Two box checks and a narrative focused on rated officer's potential. The first box check is an evaluation of the rated officer's promotion potential compared to all officers of the same grade. The second box check is an evaluation of the rated officer's potential in comparison to a much narrower group. That group consists of officers of the same grade which the senior rater has senior rated or are currently in the senior rater's population. As an evolutionary method of senior rater accountability, less than 50% of rated officers can receive an ABOVE CENTER OF MASS rating. For Army Competitive Category CPTS - LTCs, indicate potential Career Field for future service (OPMS XXI). (Description/example, pages 26-27)

- **HQDA Electronically Generated Label** - A label generated and placed over the senior rater's potential box check (Part VIIb) to control inflation and maintain senior rater accountability. This label is a HQDA comparison of the senior rater's box check with the senior rater boxes and/or profile at the time the OER processes at HQDA. (Description/example, pages 28-29)

- **Rated Officer's Signature** - Rated officer signs the OER after it has been completed by the rater, intermediate rater (if any), and senior rater.

NEW FEATURES

- ***SUPPORT FORM REINVIGORATION***
- ***COMPANY GRADE OFFICER DEVELOPMENT***
  - ***JUNIOR OFFICER DEVELOPMENT SUPPORT FORM (JODSF)***
  - ***MASKING SECOND LIEUTENANT REPORTS***
- ***RATER EVALUATION UPGRADE***
- ***SENIOR RATER EVALUATION***
- ***HQDA LABEL***
- ***RATED OFFICER'S SIGNATURE***

OER SUPPORT FORM

Changes to current system will be in bold type

- ***PURPOSE***

Promote a **top down emphasis** on leadership communication, integrating rated officer participation in objective setting, performance counseling, and evaluation. At beginning of the rating period, enhance planning and relate performance to mission through joint rater and rated officer discussion of duty description and major performance objectives. During rating period, encourage performance counseling and best use of individual talent by continuous communication to update and revise performance objectives. At end of rating period, enable rated officer input to OER.

- ***PROCESS***

– **BEGINNING OF RATING PERIOD:**

o **Shortly after rated officer assumes duties, rater will provide him/her with copies of rater's and senior rater's most recent support forms.** Rated officer then drafts support form -DUTY DESCRIPTION (Part IVa) and MAJOR PERFORMANCE OBJECTIVES (Part IVb).

o Within first 30 days rater conducts initial face-to-face counseling with rated officer, and approves DUTY DESCRIPTION/MAJOR PERFORMANCE OBJECTIVES. **(Note: Raters of LTs/W01s will also finalize initial developmental tasks on Junior Officer Developmental Support Form (JODSF) using major performance objectives as basis for these tasks.)**

o When initial face-to-face counseling is completed, rated officer dates and initials in Part III of Support Form; rater also initials (Part III) and forwards support form to senior rater. **Senior rater reviews and initials in Part III**, and returns it to rater. Rater retains a copy and returns original to rated officer. **(Note: Raters of LTs /W01s will also forward initial JODSF to senior rater for approval/initials.)**

– **DURING RATING PERIOD:**

o Rated officer uses support form as a performance guide. Rater conducts periodic follow-up performance counseling with rated officer to make needed adjustments to objectives. **LTs/WO1s: required quarterly**; CPTs/CW2s: goal is once around midpoint (3-6 months); field grade: as needed. Rated officer dates/initials in Part III; rater initials in Part III; rater should forward updated support form to senior rater for review and initials in Part III, and return it to the rater. Rater retains a copy and returns original to rated officer. **(Note: Raters of LTs/W01s also use JODSF, and are required to forward updated support form to the senior rater).**

– **END OF RATING PERIOD**:

o Rater officer completes support form, "SIGNIFICANT CONTRIBUTIONS", Part IVc, and forwards to rater. *Rater* uses support form as INPUT for OER; writes comments to senior rater in Part Va and signs; and forwards support form and OER to intermediate rater or senior rater. *Intermediate rater* also uses support form as OER input and writes comments in Part Vb, signs, and forwards OER and support form to senior rater. *Senior rater* uses support form as OER input and returns support form to rated officer.

SUPPORT FORM PURPOSES

Enhance Leadership Communication
Link Performance to Mission
Facilitate Leader Development
Provide Rated Officer Input for OER

SUPPORT FORM PROCESS

BEGINNING OF RATING PERIOD-- FIRST 30 DAYS

INBRIEF

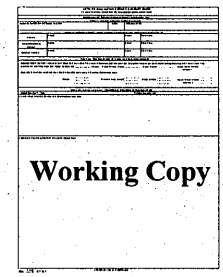


-rater/senior rater Support Form copies to rated officer
-rated officer drafts Support Form

INITIAL
Face-to-Face Discussion

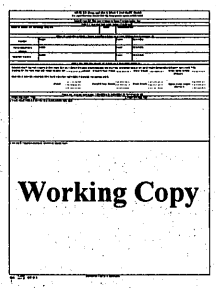


Rated Officer and Rater



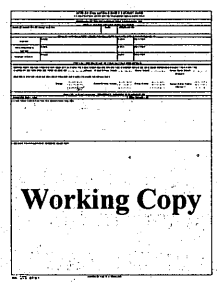
Rated Officer/Rater/Senior Rater
initial

DURING RATING PERIOD



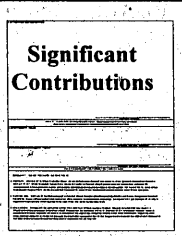


follow-up counseling



Rated Officer/Rater/Senior Rater
initial

END OF RATING PERIOD



RATED OFFICER
completes Support Form

RATER
completes Support Form and OER

SR RATER
- completes OER
- **RETURNS SUPPORT FORM**

OER SUPPORT FORM-FRONT SIDE

The front side of DA Form 67-9-1 contains the rated officer and rating chain identification and provides for the rated officer's description of his/her duties and major performance objectives during the rating period.

- ***PART I-IDENTIFICATION***

Self-explanatory. Completed by rater.

- ***PART II-RATING CHAIN***

Rater fills in name, rank, and duty position of rater, intermediate rater, and senior rater at the beginning of the rating period.

- ***PART III-VERIFICATION OF FACE-TO-FACE***

Rated officer, rater, and senior rater initial and date in this box, verifying that face-to-face discussions occurred. **(Note: Added additional boxes for periodic follow-up counselings)**

- ***PART IV - RATED OFFICER***

– **BLOCK a** - Rated officer describes significant duties and responsibilities. Description will include primary duties and major additional duties. Career managers and DA Selection Boards constantly report that duty descriptions on evaluation reports are critical. Descriptions must be clear and concise, emphasizing specific functions required of the rated officer while noting conditions peculiar to the position. It is the rated officer's opportunity and responsibility to report the duties as they really exist. The rater will review, adjust, and approve the duty description at the initial face-to-face discussion (30 day point) and any subsequent changes made during follow-up discussions. *The duty description on the Support Form transfers directly to the duty description box on the OER.*

– **BLOCK b** - Rated officer indicates major performance objectives for the rating period. These are the most important tasks, priorities, and major areas of concern and/or responsibility associated with performance. When first drafted by the rated officer, it is his/her plan for accomplishing the mission and duties described in BLOCK a. After the initial face-to-face discussion, it constitutes a mutually discussed performance contract between the rater and rated officer. ***For LTs/ W01s, major performance objectives form the basis for developmental tasks listed later on the Junior Officer Developmental Support Form-see pages 12/13.***

EXAMPLE OF COMPLETED OER SUPPORT FORM -- FRONT SIDE

OFFICER EVALUATION REPORT SUPPORT FORM

For use of this form, see AR 623-105; the proponent agency is ODCSPER

Read Privacy Act Statement on Reverse before Completing this form

PART I - RATED OFFICER IDENTIFICATION

NAME OF RATED OFFICER (Last, First, MI)	RANK	ORGANIZATION
FRONT, RANGER N.	1LT	B Company, 1-41 Infantry Battalion

PART II - RATING CHAIN - YOUR RATING CHAIN FOR THE EVALUATION PERIOD IS:

	NAME	RANK	POSITION
RATER	SMITH, JAMES C.	CPT	Company Commander
INTERMEDIATE RATER			
SENIOR RATER	BROWN, WALTER F.	LTC	Battalion Commander

PART III - VERIFICATION OF FACE-TO-FACE DISCUSSION

MANDATORY RATER / RATED OFFICER INITIAL FACE-TO FACE COUNSELING ON DUTIES, RESPONSIBILIITIES AND PERFORMANCE OBJECTIVES FOR THE CURRENT RATING PERIOD TOOK PLACE ON _____ (Date) Rated Officer Initials _____ Rater Initials _____ Senior Rater Initials _____ (Review)

PERIODIC RATER / RATED OFFICER FOLLOW-UP FACE-TO-FACE COUNSELINGS:

Dates	Rated Officer Initials	Rater Initials	Senior Rater Initials (Review)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

PART IV - RATED OFFICER *(Complete a, b, and c below for this rating period)*

PRINCIPAL DUTY TITLE Platoon Leader | POSITION AOC / BR 11A

a. STATE YOUR SIGNIFICANT DUTIES AND RESPONSIBILITIES

Platoon Leader for a mechanized Bradley Infantry Platoon consisting of 31 soldiers and 4 Bradley Fighting Vehicles. Responsible for the training and execution of all assigned platoon missions. Ensure that high standards, discipline and performance are maintained consistent with a combat ready unit. Maintain over $2 million of assigned equipment to Army standard. lead, care, and develop soldiers in order to successfully carry out all assigned combat and peacetime missions. Additional duties include Arms Room Officer and NBC officer.

b. INDICATE YOUR MAJOR PERFORMANCE OBJECTIVES

1. Ensure the platoon is combat ready for upcoming National Training Center (NTC) rotation by planning and executing tough training leading to a "GO" on all missions during ARTEP and 100% first time qualification on tables 8 and 12 during gunnery.

2. Work with NCOs to implement a demanding individual training program resulting in 25% of eligible soldiers earning the expert infantry badge.

3. Keep a high state of physical fitness in the platoon by maintaining a platoon average score of 250 on APFT.

4. Properly care for assigned equipment by maintaining 100% property accountability, and over a 90% Operational Readiness (OR) rate for all platoon equipment.

5. Take care of soldiers and their families by providing a supportive environment that finds solutions to problems and promotes equal opportunity.

6. Keep myself in good physical condition and achieve a personal score of above 280 on APFT.

7. Develop my professional abilities as an officer to prepare myself for positions of increasing responsibility and company command.

DA FORM 67-9-1, OCT 97 REPLACES DA FORM 67-8-1, FEB 85, WHICH IS OBSOLETE, 1 OCT 97

OER SUPPORT FORM - REVERSE SIDE

The reverse side of DA Form 67-9-1 enables the rated officer to record significant contributions made during the rating period. The rater and the intermediate rater (if any) can also provide written input for the senior rater.

- ***PART IVc - SIGNIFICANT CONTRIBUTIONS***

– The rated officer describes his/her *significant contributions* during the rating period. This input is not intended to be an item by item check of objectives in Part b, but rather to highlight those contributions the rated officer considers to be major accomplishments. The "significant contributions" should address duties/responsibilities and constitute the rated officer's written performance input to the rater and senior rater for his/her OER. Therefore, entries should be focused on mission accomplishment.

- ***PART V - RATER AND/OR INTERMEDIATE RATER COMMENTS***

– Rater and Intermediate Rater Comments. In Parts Va and Vb, the rater and intermediate rater record appropriate comments as input for the senior rater's evaluation. Their signatures indicate that they have reviewed the rated officer's input- "Significant Contributions" in Part IVc.

EXAMPLE OF COMPLETED OER SUPPORT FORM -- REVERSE SIDE

c. LIST YOUR SIGNIFICANT CONTRIBUTIONS

1. As a result of well designed train-up program, achieved a GO on all assigned missions during ARTEP and 100% first time qualification on tables 8 and 12 at gunnery.
2. Successes at the ARTEP, gunnery, and company training exercises led to a highly successful performance at NTC.
3. Maintained platoon average APFT score of 250. Remedial PT program enabled a 100% APFT pass rate for the platoon. Led by example with a max score on the APFT.
4. Completed the Installation EO course and taught highly successful company OPD classes in EO, prevention of sexual harassment, and Ethical behavior.
5. Maintained 100% property accountability for all assigned equipment with a 95% OR rate.
6. Implemented an active Family Support Program with spouse calling trees within each squad.
7. Prepared required book reports each quarter, one of which was used as the battalion example at the Bn Cdr's 2d quarter ODP.
8. Earned my EIB at the first test available in the battalion. Developed a practice training program in the first month which resulted in 20 soldiers earning their EIB, bringing the platoon rate to 40%.
9. Earned the Company Commander's TOP Platoon Maintenance award for the year.

SIGNATURE AND DATE

PART V - RATER AND/ OR INTERMEDIATE RATER *(Review and comment on Part IVa, b, and c above).*
Insure remarks are consistent with your performance and potential evaluation on DA Form 67-9.)

a. RATER COMMENTS *(Optional)*

SIGNATURE AND DATE (Mandatory)

b. INTERMEDIATE RATER COMMENTS *(Optional)*

SIGNATURE AND DATE (Mandatory)

DATA REQUIRED BY THE PRIVACY ACT *(U.S.C. 552a)*

1. AUTHORITY: Sec 301 Title 5 USC; Sec 3012 Title 10

2. PURPOSE: DA Form 67-9, Officer Evaluation Report, serves as the primary source of information for officer personnel management decisions. DA Form 67-9-1, Officer Evaluation Support Form, serves as a guide for the rated officer's performance and development, enhances the accomplishment of the organization mission, and provides additional performance information to the rating chain. DA Form 67-9-1a, Junior Officer Developmental Support Form, serves as a common framework for Junior Officer Development and standardizes Junior Officer counseling.

3. ROUTINE USE: DA Form 67-9 will be maintained in the rated officer's Official Military Personnel File (OMPF) and Career Management Individual File (CMIF). A copy will be provided to the rated officer either directly or forwarded to the rated officer. DA Form 67-9-1 and DA Form 67-9-1a are for organizational use only and will be returned to the rated officer after review by the rating chain.

4. DISCLOSURE: Disclosure of the rated officer's SSN (Part I, DA Form 67-9) is voluntary. However, failure to verify the SSN may result in a delayed or erroneous processing of the officer's OER. Disclosure of the information in Part IV, DA Form 67-9-1 is voluntary. However, failure to provide the information requested will result in an evaluation of the rated officer without the benefits of that officer's comments. Should the rated officer use the Privacy Act as a basis not to provide the information requested in Part IV, the Support Form will contain the rated officer's statement to that effect and be forwarded through the rating chain in accordance with AR 623-105.

JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM (JODSF)

- ***PURPOSE***

– Field Manual 100-5, **OPERATIONS**, states "the ***most essential dynamic of combat power is competent and confident officer and noncommissioned officer LEADERSHIP***." For officers, the toughest and most critical development normally occurs in units as Lieutenants and junior Warrant Officers. Accordingly, the Chief of Staff, Army directed that the new officer evaluation reporting system (OERS) assist in the rapid, equal, and fair transition of junior officers into the Army's leadership culture. Army values/ethics and leadership doctrine will be the common framework and focus; and junior officer counseling will drive the process. Of course, developmental efforts must support mission accomplishment, and senior raters will provide the experienced oversight.

- ***CONCEPT***

– The JODSF concept is to drive development and integrate it with performance. As with the Support Form , the rater directs the process, with active participation from the rated officer. The form is used to build a developmental plan based on tasks that target major performance objectives listed on the OER Support Form. The requirement is to record at least one developmental task in each doctrinal leadership action listed on the form. **Example of Support Form/JODSF crosswalk is on the next page**. Although the JODSF emphasizes development, it also drives the junior officer's efforts toward mission accomplishment. *THIS DEVELOPMENTAL PLAN IS PUT INTO EFFECT WHEN THE SENIOR RATER APPROVES IT*, signified by his/her initials on the form.

– The process does not end with the approved plan. Once the developmental tasks are established and approved by the senior rater, the rater conducts quarterly follow-up counseling sessions to discuss performance and developmental progress with the rated officer. The rater will record key points and comments on the reverse side of the JODSF. Dates and initials of these follow-up sessions will be annotated on the reverse side of the JODSF and the front side of the Support Form.

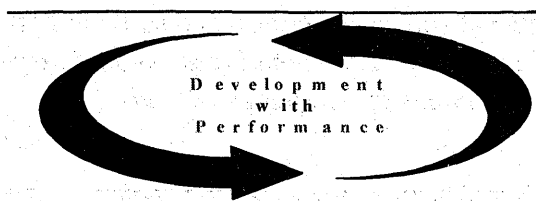
– Senior rater's role is key to the success of this program; he/she must foster command climates that promote active and open communication. He/she must also ensure that raters are actively and properly developing junior officers. In that environment, this form provides a valuable developmental aid which enhances mission accomplishment while reinforcing Army leadership doctrine and values.

PURPOSES

- *INSTITUTIONALIZE ARMY VALUES AND LEADERSHIP DOCTRINE AS THE COMMON FRAMEWORK FOR JUNIOR OFFICER DEVELOPMENT*
- *ASSIST JUNIOR OFFICER TRANSITION INTO ARMY LEADERSHIP CULTURE*
- *STANDARDIZE JUNIOR OFFICER DEVELOPMENTAL COUNSELING*

JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM

PROMOTES AND INTEGRATES



BY .....

- REQUIRING DEVELOPMENTAL TASKS WHICH ARE *FOCUSED* ON DOCTRINAL LEADERSHIP ACTIONS *AND* BASED ON MISSION
- MANDATORY QUARTERLY COUNSELINGS
- SR RATER APPROVAL/OVERWATCH

CROSSWALK-- *Performance Objectives & Developmental Tasks*

EXAMPLE...

OER SUPPORT FORM -- DA FM 67-9-1	JR OFF DEV SPT FM -- DA FM 67-9-1a
Part IV.b.- Indicate your major performance objectives	Part II- Developmental Action Plan *-listed by Leadership action/behavior*
1.Ensure the platoon is combat ready for NTC ..	(Communicating) (1) Practice briefing oral OPORD... (Planning) (1) Prepare detailed load plan... (Team Building) (1) Start battle drills program.... (Decision Making) (1) Prepare formal risk analysis...

Each developmental task supports an objective on the OER Support Form.
Result: The rated officer develops professionally and accomplishes the mission.

JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM - PROCESS

- ***BEGINNING OF RATING PERIOD***

– Rater will provide LT or WO1 with rater and senior rater support forms and a copy of Junior Officer Developmental Support Form (DA Form 67-9-1a). The LT/WO1 drafts initial major performance objectives (DA Form 67-9-1) and becomes familiar with doctrinal leadership attributes/skills/actions listed on DA Form 67-9-1a-JODSF.

o Rater will conduct an initial face-to-face discussion with rated officer to discuss duties and objectives as soon as possible, ***but not later than 30 days after beginning of the rating period***. Outcome of this discussion will be:

o OER Support Form- The duties and major performance objectives have been established, discussed, and properly recorded in Part IVa and IVb.

o Junior Officer Developmental Support Form - Doctrinal values, attributes, and skills in Part II are discussed. Initial developmental tasks recorded in Part III. D*evelopmental tasks should target major performance objectives listed on the Support Form (examples are on pages 14 and 16).* Rater/rated officer date and initial in Part IV.

Best method to accomplish desired outcome is for rated officer to draft OER Support Form duties and major performance objectives, and rater draft developmental tasks for JODSF, prior to face to face discussion. This initial preparation will ensure discussion is focused and both officers have appropriate input.

– Rater will then obtain the senior rater's approval and initials in Part III of the Support Form and Part IV of the JODSF.

- ***DURING RATING PERIOD***. Rater and rated officer will use Support Form and JODSF as working documents throughout remainder of rating period. Raters will conduct quarterly performance/developmental counselings with their LTs/WO1s to adjust/update performance objectives and developmental tasks, and complete the Developmental Assessment Record in Part IV on reverse side of JODSF. *After each quarterly session, both rater and rated officer initial and date Part IV of JODSF and update Part III of Support Form. Raters are required to forward updated support form to the senior rater for review and initials, signifying compliance to quarterly counseling requirement.*

- ***END OF RATING PERIOD.***

– Using JODSF (DA Form 67-9-1a) as critical **input**, rated officer finalizes "significant contributions" on Support Form (Part IVc, DA Form 67-9-1).

– Rater uses JODSF and Support Form as input for comments on final Support Form and OER. During accompanying follow-up counseling, rater will review overall performance during entire rating period with the LT/WO1, and review/update Support Form and JODSF. **(NOTE: JODSF will NOT be forwarded to senior rater with support form and OER)**

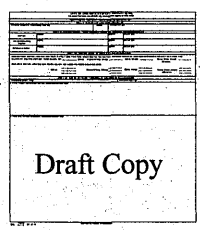
JR OFF DEVELOPMENTAL SUPPORT FORM PROCESS

BEGINNING OF RATING PERIOD-- FIRST 30 DAYS

INBRIEF



-rater/senior rater Support Form copies to rated officer
-rated officer drafts Support Form; reviews JODSF

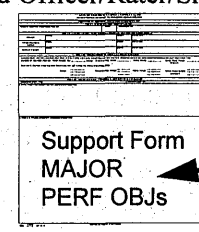


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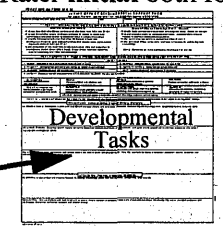
INITIAL
Face-to-Face Discussion



Rated Officer/Rater:
- set objectives (Support Form)
- formulate <u>developmental tasks</u> (JODSF)
- Rated Officer/Rater/Sr Rater **initial** both forms



67-9-1

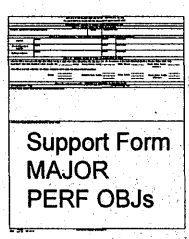


67-9-1a

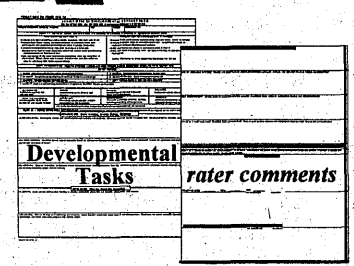
DURING RATING PERIOD

follow-up counseling





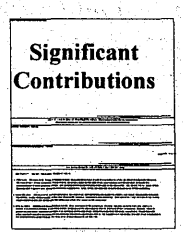
67-9-1



67-9-1a

- Adjust Performance Objectives
- Update/modify developmental tasks
- **Discuss performance/development focus**
- Rater records key points on JODSF
- Rated Off/Rater initial JODSF
- Senior rater initials Support Form

END OF RATING PERIOD



RATED OFFICER
completes Support Form

RATER

-Reviews JODSF
- completes/forwards Support Form/OER
- <u>retains</u> JODSF

SENIOR RATER

- completes OER
- **RETURNS SUPPORT FORM**

JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM - FRONT SIDE

The front side of DA Form 67-9-1a contains the rated officer identification, instructions to complete the form and the Developmental Action Plan.

- ***PART I - INSTRUCTIONS*** - Provides exact instructions on the conduct of the initial counseling, and follow-up quarterly counseling.

- ***PART II - CHARACTER*** - Doctrinal definitions for Army values and leader attributes/skills which form the disposition of a leader's character are defined to assist in the process.

- ***PART III - DEVELOPMENTAL ACTION PLAN (DAP)*** - The blocks within each leadership action where developmental tasks are recorded. The number of the targeted major performance objective is recorded in parenthesis to the left of each developmental task - See examples next page. *(Note: Developmental tasks may target a value, attribute or skill (Part II) in addition to the action. Raters have the **option** to record them following the task as shown in examples below.)*

Below are examples of developmental tasks from company grade officer test groups. More on page 16.

EXAMPLES OF DEVELOPMENTAL TASKS

COMMUNICATING

- Improve your effective writing skills by revising the unit's maintenance SOP by 1 Feb.
- Practice oral communication skills through briefing the CO bi-monthly on the platoon's training status.
- Provide unexploded ordnance briefings to units on post. Show me a scripted briefing by January 15th.
- Brief CO/XO on the complete 5 paragraph OPORD for upcoming AERIAL Gunnery range. (tactical skills)
- Present practice briefing to CO on air medical support for Bde ambulances before Gold and Black cycles.

DECISION MAKING

- Provide decision briefing to CO on 1 April, with recommendations on how to use available funds.
- Provide a formal risk analysis prior to platoon EXEVAL's in March. (tactical and conceptual skills)
- Review Bn Cdr's and CO's Support Forms and brief CO on your understanding of "Commander's Intent."
- Review Deliberate Decision Making process (FM 101-5); give a class during the 3d Qtr OPD.

MOTIVATING

- Improve cohesiveness by organizing a platoon Sports and Recreation program. Implement within next 30 days.
- Practice enforcing standards by conducting pre-combat checks in preparation for the unit's JRTC rotation in March.
- Reward squads who exceed the unit confidence course standard.
- Promote espirit de corps by leading Mon morning weekly platoon level PT over the next quarter. (physical, interpersonal)

PLANNING

- By next quarter, develop plan to deploy your platoon with detailed load plans for all assigned vehicles.
- Practice planning military operations by preparing platoon five paragraph field order for FTX in August.
- Plan and brief the Quarterly Training Brief and do a dry run with the Company Commander on 2 Jun.
- Plan training for officers and spouses on Army Family Team Building.

EXECUTING

- Learn to use ULLS reports to manage maintenance; brief XO weekly on equipment status.
- Demonstrate proficiency as M1 tank commander;qualify on tables 8 & 12 at unit's gunnery in October (technical skills).
- Conduct the quarterly M16 zero and qualification range to battalion standard. (tactical)
- By the end of this quarter, initiate and coordinate joint medical training with your platoon and the hospital.

EXAMPLE OF JODSF - FRONT SIDE

(JODSF IS A WORKING DOCUMENT, THEREFORE IT IS NORMALLY HANDWRITTEN)

JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM

For use of this form, see AR 623-105; the proponent agency is ODCSPER

NAME OF RATED OFFICER (Last, First, MI)	SSN	GRADE	ORGANIZATION
FRONT, Ranger N.	111-11-1111	2LT	B/1-41 Inf Bn

PART I - INSTRUCTIONS. Use of this form is mandatory for Lieutenants and WO1s; optional for all other ranks.

Initial face-to-face (Part II and III)

- Discuss duty description/major performance objectives from DA Form 67-9-1.
- Discuss Army leader values, attributes and skills as related to future duty performance and professional development (Part II: Leader Character)
- Complete Developmental Action Plan (Part III)- Record at least one developmental task for each leadership action that targets major performance objectives listed on DA Form 67-9-1.
- Upon completion of the initial face-to-face counseling, date and initial Part IV (verification). Obtain senior rater's initials. Rated officer and rater retain file copy for use during later follow-up counselings.

Quarterly Follow-up Counselings (Part V - Reverse)

- Discuss major performance objectives and progress made. Adjust as needed.
- Discuss progress made on developmental tasks; update/modify tasks as needed to continue developmental process.
- Rater summarize key points in appropriate block of Part V.
- Rater and rated officer initial, date, and keep a file copy for use during later counselings.

NOTE: Reference for Army Leadership Doctrine is FM 22-100.

PART II CHARACTER. Disposition of the leader: combination of values, attributes, and skills affecting leader actions. (See FM 22-100)

ARMY VALUES

1. **HONOR:** Adherence to the Army's publicly declared code of values
2. **INTEGRITY:** Possesses high personal moral standards; honest in word and deed
3. **COURAGE:** Manifests physical and moral bravery
4. **LOYALTY:** Bears true faith and allegiance to the U.S. Constitution, the ARMY, the unit, and the soldier
5. **RESPECT:** Promotes dignity, consideration, fairness, & EO
6. **SELFLESS-SERVICE:** Places Army priorities before self
7. **DUTY:** Fulfills professional, legal, and moral obligations

ATTRIBUTES Fundamental qualities and characteristics	**MENTAL** Possesses desire, will, initiative, and discipline	**PHYSICAL** Maintains appropriate level of physical fitness and military bearing	**EMOTIONAL** Displays self-control; calm under pressure
SKILLS (Competence) Skill development is part of self-development; prerequisite to action	**CONCEPTUAL** Demonstrates sound judgment, critical / creative thinking, moral reasoning	**INTERPERSONAL** Shows skill with people: coaching, teaching, counseling, motivating and empowering	**TECHNICAL** Possesses the necessary expertise to accomplish all tasks and functions
	TACTICAL Demonstrates proficiency in required professional knowledge, judgment, and warfighting		

PART III - DEVELOPMENTAL ACTION PLAN. Development tasks that target major performance objectives on the DA Form 67-9-1. (See FM 22-100)

INFLUENCING: Communicating, Decision Making, Motivating

COMMUNICATING. Articulates written and oral ideas/concepts clearly and concisely. Message received equals message sent. Displays effective listening skills.

(1, 7) Present Law of War class at Company OPD/NCOPD session on 5 May.

(5) Practice oral OPORD brief with Company Cdr/XO during Apr FTX.

DECISION MAKING. Reaches sound, logical decisions based on analysis/synthesis of information, and uses sound judgement to allocate resources and select appropriate course(s) of action.

(1) Provide CO formal "risk analysis" prior to May FTX.

(7) Facilitate discussion of the "Ethical Decision Model" during June company OPD/NCOPD.

MOTIVATING. Inspires, motivates, and guides others towards mission accomplishment. Sets the example by being in excellent physical / mental condition and consistently displaying proper military bearing.

(3,6) Lead platoon PT each Monday in Apr - set example for NCOs.

(4) Qualify your tank first run on Tank Table VIII with a score of 800 or higher

OPERATING: Planning, Executing, Assessing

PLANNING Uses critical and creative thinking to develop executable plans that are suitable, acceptable, and feasible.

(1) Brief CO on detailed load plans for assigned vehicle NLT 1 Apr.

(1) Develop 180 day PLT Tng plan in all METL tasks - brief CO NLT 15 Mar.

EXECUTING. Shows tactical and technical proficiency; meets mission standards; takes care of people/resources. Maximizes the use of available systems and technology. Performs well under physical and mental stress.

(3) Learn to use ULLS reports to manage maintenance; brief XO weekly on equipment status.

(1) Prepare and conduct 60 minute block of instruction on casualty reporting and present to PLT during a May SGT's Time.

DA Form 67-9-1a

JUNIOR OFFICER DEVELOPMENTAL SUPPORT FORM - REVERSE SIDE

The reverse side of DA Form 67-9-1a contains the remainder of the Developmental Action Plan, the verification of follow-up counseling, and the Developmental Assessment Record.

- ***PART III - DEVELOPMENTAL ACTION PLAN (DAP), continued.***
  NOTE: More examples of developmental tasks are below.

- ***PART IV - VERIFICATION***

The rated officer and rater initial this section after the developmental tasks have been set and discussed. The senior rater will also initial once he/she has approved the initial DAP. *NOTE: This step with the senior rater only applies to the initial developmental counseling (within first 30 days of the rating period). Approval of updates to the DAP are not required.*

- ***PART V - DEVELOPMENT ASSESSMENT RECORD***

The rater will record key points discussed during the follow-up performance/developmental counseling sessions. The rated officer and rater initial this block, acknowledging the follow-up counseling and associated written summary. (NOTE: They also initial the DA Form 67-9-1, Part III, signifying completion of the follow-up counseling requirement, which is forwarded to senior rater for initials).

EXAMPLES OF DEVELOPMENTAL TASKS

ASSESSING

- Set up a platoon AAR program for field exercises designed to maximize soldier participation.
- Observe 2d platoon during squad proficiency training and assist battalion observers in developing their assessment. (technical)
- Observe platoon AAR during external evaluation of 2d Platoon in April.

DEVELOPING

- Familiarize yourself with the Army services available to assist soldiers; visit the following offices located on post within the next thirty days; ADAPC, ACS, AER, and the Chaplain's office. (duty, interpersonal skills)
- Promote a climate of ethical behavior in the platoon by facilitating an officer/NCO discussion next month on the ethical climate assessment survey as described in FM 22-100, Army Leadership. (all values and mental attributes)
- Conduct initial and follow-up counselings with all subordinate leaders, Discuss scope of duties, performance objectives, and key tasks. (interpersonal skills)
- Require subordinate leaders to bring a self-assessment of their leadership to counseling sessions (interpersonal skills)

BUILDING

- Brief your section once a month on priorities and mission focus: where platoon is headed and why.
- Actively participate in selected squad/section level training activities.
- Organize a practice FIST Eval exercise to train the section- goal: to improve section score to above 900.
- In coordination with the Platoon NCOs, develop a platoon METL listing showing strengths and weaknesses. Brief CO NLT 1 Sep. Use for development of long range training plan.

LEARNING

- Keep pace with technology changes by taking a computer skills class during fall semester. (technical skills)
- Increase professional knowledge by reading one book per quarter from Bn reading list. Do 2 page summary on each. (Technical, tactical, conceptual skills; duty)
- Read FM 25-100 and give me a 30 minute or less summary briefing after the Feb training meeting.
- Take 2 months to gain and demonstrate proficiency in the software programs used in the Bn. (technical skills)

EXAMPLE OF JODSF - REVERSE SIDE

ASSESSING Uses after-action and evaluation tools to facilitate consistent improvement.

(1,7) Set up PLT AAR program for FTX's to maximize soldier participation.

(7) Conduct full alert and load-up this month; give CO a written assessment of the PLT's performance (1 pg summary).

IMPROVING Developing, Building, Learning

DEVELOPING Teaches, trains, coaches and counsels subordinates increasing their knowledge, skills and confidence.

(5) Conduct all quarterly counselings and check platoon's NCO counseling records. Brief CO during Wednesday Leader's mtg.

(2) Have NCOs rehearse platoon tng plan and observe. Coordinate with CO to attend April's rehearsal.

BUILDING . Develops effective, disciplined, cohesive, team built on bonds of mutual trust, respect, and confidence. Fosters ethical climate.

(1,2) Within 60 days implement "Battle Drills" program to improve soldier/team warfighting skills.

(5) Organize one social event per quarter for the platoon.

(1) Brief platoon once a month on priorities and mission focus; where we are headed and why.

LEARNING. Actively seeks self-improvement (individual study, professional reading, etc.), and fosters a learning environment in the unit (IPRs, AARs, NCOPD, etc.)

(1, 7) Be an observer at A/1-41 Inf ARTEP in Mar. and gunnery in April.

(7) Provide CO with 2-3 page book summary each month. (from Battalion reading list)

PART IV - VERIFICATION: Rater initials JCS Rated officer initials RNJ Date 10 Oct 97 Senior rater initials WFB

PART V - DEVELOPMENTAL ASSESSMENT RECORD. Summary of key points made during follow-up counselings. Highlight progress and strengths observed as well as developmental needs across values, attributes, skills and actions.

1st Assessment Key Points

- Super job at gunnery and on load plans.
- Showed significant improvement in leading PT after first few times. Increased confidence reflected in your OPD class.
- Continue working on writing skills - make dcorrections on book summary (focus area).
- Work on AAR program (focus area).
- TOP PRIORITY IS NTC PREP. SOLID PERFORMANCE OVERALL KEEP CHARGING!

Rated officer initials RNJ Rater initials JCS Date 2 Jan 98

2nd Assessment Key Points

Rated officer initials _____ Rater initials _____ Date _____

3rd Assessment Key Points

Rated officer initials _____ Rater initials _____ Date _____

OERS COUNSELING PROCESS

Counseling is a key aspect of the OERS process. The OER Support Form (DA Form 67-9-1) and Junior Officer Developmental Support Form (DA Form 67-9-1a- JODSF), facilitate counseling. Counseling should be face-to face communication with the rated officer actively involved. The session should result in the development of a plan of action for the rated officer to accomplish performance objectives. Below is an outline of the OERS counseling process

- ***PREPARATION***

Both rater and rated officer should prepare for counseling session to ensure it is organized, focused, and achieves two-way communication and involvement in objective setting and performance assessment. Figure A-1 provides preparation recommendations.

- ***COUNSELING OUTLINE***

FM 22-100, Army Leadership describes four basic components of a counseling session. Figure A-2 provides some counseling tips by component.

– ***INITIAL COUNSELING OUTLINE***

o ***Open the Session*** - State purpose: to discuss/record duty description and major performance objectives on the Support Form, DA Form 67-9-1 and to create a Developmental Action Plan (DAP) **(LTs/WO1s only.)**

o ***Discuss Issue*** - Jointly review duty description/performance objectives on Support Form. (See Major Performance Objective Checklist, Figure A-3) Revise as needed. Discuss values, attributes, skills, and actions listed on the OER and relate to unit/organization and duties.

o ***Develop a Plan of Action*** - Identify actions to facilitate attainment of performance objectives listed on the OER Support Form (Recommend letting rated officer discuss ideas first). **LTs/W01s**: Use JODSF, DA Form 67-9-1a Part III, to record the DAP

o ***Close the Session*** - Review duty description, performance objectives, and action plan. Gain rated officer's commitment toward the plan.

– ***FOLLOW-UP COUNSELING OUTLINE***

o ***Open the Session*** - State purpose: to review performance and update duty description, major performance objectives, and action plan.

o ***Discuss the Issue*** - Jointly review duty description/major performance objectives and update as needed. Discuss performance and potential areas for development. **LTs/W01s**: From the JODSF, determine values, attributes, skills and actions where development will be focused.

o ***Develop a PLAN of Action*** - Update action plan. **LTs/W01s**: Modify or create new developmental tasks to continue the developmental process.

o ***Close the Session*** - Summarize key points and review action plan. Gain rated officer's commitment toward the plan. **LTs/W01s**: Record comments - item V (JODSF).

PREPARATION

	RATED OFFICER PREPARATION	*RATER PREPARATION*
Initial Counseling (OER Support Form) DA Form 67-9-1 (Within 1st 30 days)	- Draft duty description and major performance objectives. - Provide draft Support Form copy to rater. - Prepare to discuss duties and objectives.	- Provide rated officer copies of rater's/senior rater's support forms, & OER Spt Fm with initial drafted duty description. - Receive/review rated officer's draft Spt Fm. - Schedule counseling with rated officer. - Outline counseling session.
Initial Counseling (JODSF-DA Form 67-9-1a) (Within 1st 30 days)	Initial Support Form preparation PLUS: - Review values/attributes/skills/actions- JODSF/FM 22-100; Review "OER Guide." - Outline possible developmental tasks.	Initial Support Form preparation PLUS: - Review values/attributes/skills/actions - JODSF/FM 22-100; Review "OER Guide." - Outline possible developmental tasks for each area on the JODSF. - Make outline/plan for conducting session.
Follow-up Counseling (OER Support Form)	- Review OER Support Form - Conduct self assessment. - Draft revisions: duties/performance obj's. - Prepare to discuss revisions, performance, changing priorities, etc.	- Review OER Support Form. - Observe and assess rated officer. - Review record of observation/assessment. - Outline counseling session.
Follow-up Counseling (JODSF)	Follow-up OER Spt Fm preparation PLUS: - Review JODSF. - Outline target areas for development, and corresponding developmental tasks.	Follow-up OER Spt Fm preparation PLUS: - Review JODSF. - Outline target areas for development and corresponding developmental tasks.

Figure A-1

4 Components of a Counseling Session-Tips

1. **OPEN THE SESSION.** Identify the purpose up front. Establish a comfortable environment. Invite subordinate to talk early. Employ active listening, both verbal and non-verbal.
2. **DISCUSS THE ISSUE.** Ask open ended questions. Respond to clarify message and check understanding. Allow time for reflection. Provide specific feedback and support with specific observations/behaviors. Avoid generalizations. Highlight successes as well as shortcomings.
3. **DEVELOP A PLAN OF ACTION** Emphasize development and improvement. Encourage subordinate involvement to create/modify plan.
4. **CLOSE THE SESSION.** Summarize main points. Record comments for future assessments.

Figure A-2

Major Performance Objective Checklists

Is performance objective:

1. Supportive of unit goals? 2. Relevant to an important aspect of the duty position? 3. Measurable with qualitative or quantitative criteria? 4. Results oriented? 5. Specific? 6. Clearly worded? 7. Set in a reasonable time? 8. Achievable? 9. Challenging? 10. Supported by authority and resources? 11. Backed by an action plan?

Figure A-3

OFFICER EVALUATION REPORT

- ***PART I - ADMINISTRATIVE DATA***

– Part I contains administrative data and includes the identification of rated officer, period covered, and reason for submission of the report. Part I is completed by the servicing PSB or appropriate administrative office.

- ***PART II - AUTHENTICATION***

– Detailed Instructions.

o Prior to initiating the report, the Bn S1 or Administrative Officer will ensure that data identifying rating officials is accurate and duty assignment entries reflect position titles. DA Form 67-9 is then forwarded to the rated officer.

o Rated officer verifies administrative data and forwards the report, prior to signing it, along with his/her completed support form, to the rater.

o Rater and, if designated, intermediate rater, complete the report and verify all data provided elsewhere on the form, sign and date it, prior to passing the report to the senior rater.

o Senior rater is responsible for providing the capstone evaluation of the rated officer's performance and potential in Part VII of the OER. His/her signature also verifies that the report has been completed in accordance with instructions provided in the OER regulation, AR 623-105; that proper evaluation channels have been followed; and that the rater's and, if applicable, the intermediate rater's evaluations are fair and consistent with the rated officer's performance of duty. Signature and date entered will not be prior to the date of the intermediate rater's or rater's date of authentication.

o Rated officer signs the report after he/she has seen the completed OER, Parts I-VII. Signature and date entered should not be prior to the date of the senior rater. The report is then forwarded to HQDA in accordance with locally established procedures.

- ***PART III - DUTY DESCRIPTION***

– Part III provides for the duty description of the rated officer. It is the responsibility of the rating officials to ensure duty description information is factually correct. There are three parts (items a through c) of the duty description:

o **PART IIIa and b** - List duty title and AOC/MOS to identify the rated officer's position.

o **PART IIIc** - Describe in detail the rated officer's significant duties and responsibilities. This narrative should match the duty description on the rated officer's support form. Descriptions must be clear and concise and must emphasize specific functions required of the rated officer.

EXAMPLE OF COMPLETED PARTS I, II, AND III

OFFICER EVALUATION REPORT
For use of this form, see AR 623-105; the proponent agency is ODCSPER

SEE PRIVACY ACT STATEMENT ON DA FORM 67-9-1

PART I - ADMINISTRATIVE DATA

a. NAME (Last, First, Middle Initial)	b. SSN	c. RANK	d. DATE OF RANK (Year / Month / Day)	e. BRANCH	f. DESIGNATED SPECIALTIES / PMOS (WO
BUCK, GEORGE G.	123-12-1234	CPT	1994 05 01	QM	92A

g. UNIT, ORG., STATION, ZIP CODE OR APO, MAJOR COMMAND	h. REASON FOR SUBMISSION
HQ&A, 53rd Forward Spt Bn, Ft. Hood, TX 76760 FORSCOM	05 Annual

i. PERIOD COVERED FROM (Year / Month / Day)	THRU (Year / Month / Day)	j. RATED MONTHS	k. NONRATED CODES	l. NO. OF ENCL	m. RATED OFFICER COPY (Check one and date)	Date	n. PSB INITIALS	o. CMD CODE	p.PSB CODE
1997 10 01	1998 09 30	11	I		1. Given to Officer			F9	FC29
					2. Forwarded to Officer				

PART II - AUTHENTICATION (Rated officer's signature verifies officer has seen completed Parts I-VII and the admin data is correct)

a. NAME OF RATER (Last, First, MI)	SSN	RANK	POSITION	SIGNATURE	DATE
SCOTT, THOMAS D.	123-45-6789	MAJ	Battalion XO		15 Oct 1998
b. NAME OF INTERMEDIATE RATER (Last, First, MI)	SSN	RANK	POSITION	SIGNATURE	DATE
c. NAME OF SENIOR RATER (Last, First, MI)	SSN	RANK	POSITION	SIGNATURE	DATE
JONES, WILLIAM A.	345-67-8901	LTC	Battalion Cdr		15 Oct 1998

SENIOR RATER'S ORGANIZATION	BRANCH	SENIOR RATER TELEPHONE NUMBER	E-MAIL ADDRESS
53rd Forward Spt Batttalion Ft. Hood, Texas 76760	OD	DSN 123-1234	joneswa@hood-03-emh1.army.mil

d. This is a referred report, do you wish to make comments?	e. SIGNATURE OF RATED OFFICER	DATE
☐ Yes, comments are attached ☐ No		17 Oct 1998

PART III - DUTY DESCRIPTION

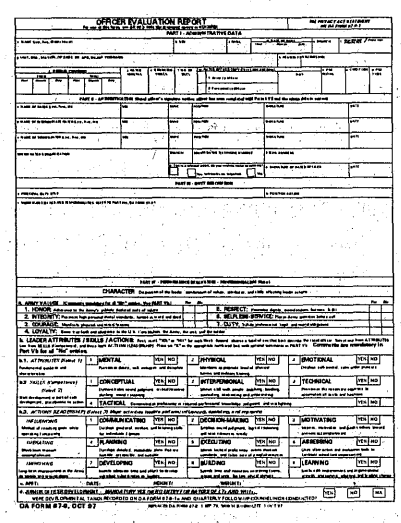
a. PRINCIPAL DUTY TITLE	b. POSITION AOC / BR
Battalion S-4	92A

c. SIGNIFICANT DUTIES AND RESPONSIBILITIES. REFER TO PART IVa, DA FORM 67- 9-1

Battalion S-4 officer for a Forward Support Battalion consisting of 625 soldiers with a mission of providing direct support to a mechanized brigade task force of the 52d Infantry Division. Supervises a primary staff section of six soldiers and serves as the principal advisor to the commander on all matters related to the battalion's internal logistics operations. Provides staff supervision to three subordinate companies operating in a multi-functional logistics environment. Additional duties include budget officer and facilities maintenance officer.

NEW FEATURE

RATED OFFICER SIGNS THE REPORT AFTER COMPLETION OF OER BY ALL RATING OFFICIALS



- ***PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM***
  (Army values and leader attributes/skills/actions for the Army Officer Corps)

– **MECHANICS:**

o ***PART IVa - Army values***. Rater will place an "x" in either the YES or NO box for values. Mandatory comments are required for all "no" entries. Comments will be made in Part Vb.

o ***PART IVb - Leader attributes/skills/actions.***
  – Rater will check either "yes" or "no" in the attributes/skills/actions boxes.
  – Rater will place an "x" in the appropriate numbered box that best describes the rated officer's strengths. Comments may be provided on these strengths or any other leadership attribute/skills/actions listed in Part IVb.

Choose: one of three ATTRIBUTES
two of four SKILLS
three of nine ACTIONS

Over time this will develop into a "leader word picture" of the rated officer's strengths.

– Comments are mandatory for all "no" responses. Comments will be made in Part Vb.

NOTE: Any "no" entry in Part IVa-c, will result in a mandatory referred report.

o ***PART IVc*** - Rater will enter (typed) the Army Physical Fitness Test (APFT) results (Pass/Fail) and the height and weight (HT/WT) data of the rated officer in Part IVc. APFT entry reflects the rated officer's status on the date of the most recent APFT administered by the unit, as of the "thru" date of the report. Weigh-in entry reflects the rated officer's height and weight as of unit's last weigh-in. If there is no weigh-in during the period covered by the report, the rater will enter the officer's height and weight as of the "thru" date of the OER. Comments are mandatory for an entry of "Fail" in the APFT area and an entry of "No" in the HT/WT area. Comments on an entry of "Profile" are mandatory only if the officer cannot perform his/her duties.

o ***PART IVd*** - Rater box checks "yes" if rated officer recorded Developmental Action Plan on JODSF and conducted 3 periodic counselings, or "no" if rated officer failed to complete one or both of these requirements. *If rated officer does not rate LTs or WO1s, rater box checks "NA".* **"NO" entry requires rater comments in Part Vb.**

EXAMPLE OF COMPLETED PART IV

PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM (Rater)

CHARACTER Disposition of the leader: combination of values, attributes, and skills affecting leader actions

a. ARMY VALUES (Comments mandatory for all "NO" entries. Use PART Vb.)	YES	NO		YES	NO
1. HONOR: Adherence to the Army's publicly declared code of values	X		5. RESPECT: Promotes dignity, consideration, fairness, & EO	X	
2. INTEGRITY: Possesses high personal moral standards; honest in word and deed	X		6. SELFLESS-SERVICE: Places Army priorities before self	X	
3. COURAGE: Manifests physical and moral bravery	X		7. DUTY: Fulfills professional, legal, and moral obligations	X	
4. LOYALTY: Bears true faith and allegiance to the U.S. Constitution, the Army, the unit, and the soldier				X	

b. LEADER ATTRIBUTES / SKILLS / ACTIONS: First, mark "YES" or "NO" for each block. Second, choose a total of six that best describe the rated officer. Select one from ATTRIBUTES, two from SKILLS(Competence), and three from ACTIONS(LEADERSHIP). Place an "X" in the appropriate numbered box with optional comments in PART Vb. **Comments are mandatory in Part Vb for all "No" entries.**

b.1. *ATTRIBUTES (Select 1)* Fundamental qualities and characteristics	1.	**MENTAL** YES X NO Possesses desire, will, initiative, and discipline	X	**PHYSICAL** YES X NO Maintains appropriate level of physical fitness and military bearing	3.	**EMOTIONAL** YES X NO Displays self-control; calm under pressure		
b.2. *SKILLS (Competence) (Select 2)* Skill development is part of self-development; prerequisite to action	1.	**CONCEPTUAL** YES X NO Demonstrates sound judgment, critical/creative thinking, moral reasoning	X	**INTERPERSONAL** YES X NO Shows skill with people: coaching, teaching, counseling, motivating and empowering	3	**TECHNICAL** YES X NO Possesses the necessary expertise to accomplish all tasks and functions		
	X	**TACTICAL** Demonstrates proficiency in required professional knowledge, judgment, and warfighting					YES X	NO
b.3. *ACTIONS (LEADERSHIP) (Select 3) Major activities leaders perform: influencing, operating, and improving*								
INFLUENCING Method of reaching goals while operating / improving	1.	**COMMUNICATING** YES X NO Displays good oral, written, and listening skills for individuals / groups	2.	**DECISION-MAKING** YES X NO Employs sound judgment, logical reasoning and uses resources wisely	3.	**MOTIVATING** YES X NO Inspires, motivates, and guides others toward mission accomplishment		
OPERATING Short- term mission accomplishment	X	**PLANNING** YES X NO Develops detailed, executable plans that are feasible, acceptable, and suitable	X	**EXECUTING** YES X NO Shows tactical proficiency, meets mission standards, and takes care of people/resources	6.	**ASSESSING** YES X NO Uses after-action and evaluation tools to facilitate consistent improvement		
IMPROVING Long-term improvement in the Army its people and organizations	7.	**DEVELOPING** YES X NO Invests adequate time and effort to develop individual subordinates as leaders	X	**BUILDING** YES X NO Spends time and resources improving teams, groups, and units; fosters ethical climate	9.	**LEARNING** YES X NO Seeks self-improvement and organizational growth; envisioning, adapting and leading change		

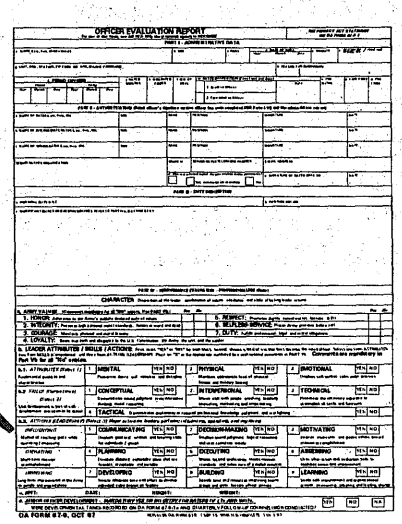
c. APFT: PASS DATE: APR 1998 HEIGHT: 69 WEIGHT: 175 YES

d. JUNIOR OFFICER DEVELOPMENT - *MANDATORY YES OR NO ENTRY FOR RATERS OF LTs AND WO1s.*

WERE DEVELOPMENTAL TASKS RECORDED ON DA FORM 67-9-1a AND QUARTERLY FOLLOW-UP COUNSELINGS CONDUCTED? YES X NO NA

DA FORM 67 - 9, OCT 97 REPLACES DA FORM 67-8, 1 SEP 79, WHICH IS OBSOLETE, 1 OCT 97

COMPLETED BY RATER



OFFICER EVALUATION REPORT

- ***PART V - PERFORMANCE AND POTENTIAL EVALUATION***

Evaluation consists of the rated officer's current duty performance, as well as, an assessment of the rated officer's ability to perform in positions of greater responsibility.

– ***PART Va*** - By placing an "x" in the appropriate box, the rater compares the rated officer's performance and potential for promotion with that of his or her contemporaries against the duty requirements and potential to perform in positions of greater responsibility. Focus is on results achieved and the manner by which they were achieved.

– ***PART Vb*** - Rater provides narrative comments on specific aspects of both performance and potential. Comments on performance should address the six leader attributes/skills/actions chosen from Part IVb, but are not limited to only these characteristics. Mandatory comments are required in Part IVb for any box checks of "no". Specific comments on performance should key on items mentioned in the duty description in Part III and, as appropriate, the duty description, objectives, and contributions portions of the OER Support Form. Comments on potential should include statements on promotion, school selection, retention, or future assignments.

– ***PART Vc (completion of this block concerning unique skills is optional)*** - Rater may indicate any unique skills/expertise which the rated officer possesses and should focus on identifying any ability of special value to the Army which may not be fully evident in other areas of an officer's personnel file. This may include a detailed understanding of a particular technological application, a specialized expertise in an aspect of the Army's mission, or an in-depth understanding of a foreign culture. (See examples below)

Unique Skills/Expertise Examples:

- **CPT Fisher is exceptionally skilled in integrating tactical and strategic computing systems using packet switch and ATM technologies.**
- **LTC Monroe is the Army expert for large scale logistical mobilization planning for airlift and sealift operations involving multiple corps.**
- **MAJ Wells is uniquely knowledgeable in developing personnel policy for the Officer Evaluation System in PERSCOM.**
- **CPT Buck is an expert on vulnerabilities and strengths of foreign armor and munitions due to his avid interest, munitions research, and mechanical engineering degree.**

– Upon implementation of the Officer Personnel Management System (OPMS) XXI, raters ***must*** enter a recommended Career Field for all Army Competitive Category CPTs through LTCs.

- ***PART VI - INTERMEDIATE RATER*** *(Example on the following page shows the XO as rater, BN Cdr as intermediate rater and the DISCOM Cdr as senior rater)*

Part VI is completed by the intermediate rater. Intermediate rater, if any, provides narrative comments on the rated officer's performance and potential.

EXAMPLE OF COMPLETED PARTS V AND VI

NAME BUCK, GEORGE P. SSN 123-12-1234 PERIOD COVERED 19971001-19980930

PART V - PERFORMANCE AND POTENTIAL EVALUATION (Rater)

a. EVALUATE THE RATED OFFICER'S PERFORMANCE DURING THE RATING PERIOD AND HIS/HER POTENTIAL FOR PROMOTION

[X] OUTSTANDING PERFORMANCE, MUST PROMOTE [ ] SATISFACTORY PERFORMANCE, PROMOTE [ ] UNSATISFACTORY PERFORMANCE, DO NOT PROMOTE [ ] OTHER *(Explain)*

b. COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE AND POTENTIAL FOR PROMOTION. REFER TO PART III, DA FORM 67-9 AND PART IVa, b, AND c DA FORM 67-9-1.

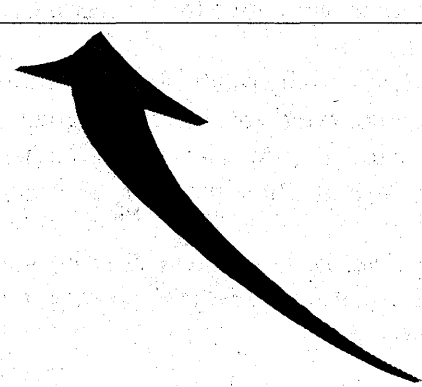
CPT Buck's performance as battalion S-4 has been truly outstanding. He has proven himself to be a highly capable primary staff officer who successfully completes all assigned missions. Under his leadership and guidance, unit supply operations improved dramatically resulting in the battalion receiving "outstanding" ratings on two successive division level Command Supply Discipline Program (CSDP) inspections. CPT Buck was the spearhead behind an effort to improve the maintenance of the barracks and other unit facilities. By aggressively monitoring facility work orders and instituting a unit self-help program he was able to directly improve the quality of life for our soldiers. During the unit's deployment to the National Training Center (NTC), CPT Buck was instrumental in ensuring that movement planning, supply and service support, and maintenance operations were all executed flawlessly. His efforts in logistics operations were instrumental in ensuring the battalion had a highly successful NTC rotation. CPT Buck's potential in the Army is limitless. He should be assigned to positions of increasing responsibility in order to maximize contribution to the Army. Select below the zone for promotion to Major and send to Command and General Staff College at the earliest possible time.

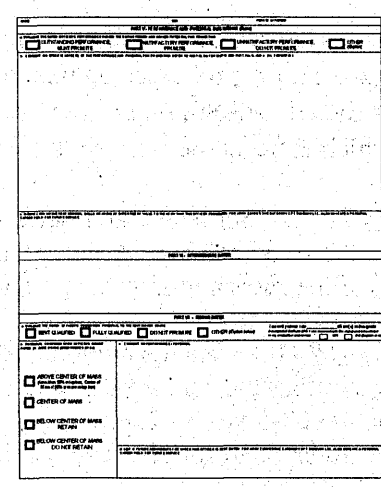
c. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

CPT Buck is an expert on vulnerabilities and strengths of foreign armor and munitions due to his avid interest, munitions research, and mechanical engineering degree.

PART VI - INTERMEDIATE RATER

The best S-4 I have seen in 17 years. He successfully accomplished many complex logistical tasks. His positive leadership style gained the confidence and loyalty of his soldiers and unit commanders he supports. An excellent manager, but most importantly an outstanding leader. Promote now and send to CGSC.





SENIOR RATER

• ***PART VII*** provides for the capstone evaluation of the rated officer's performance and potential. It is intended to capitalize on the senior rater's additional experience, broader organizational perspective, and tendency to focus on the organizational requirements and actual performance results. To assist the senior rater, information on the rated officer, contained on DA Form 67-9-1, is intended to supplement more traditional means such as personal observation, reports and records, other rating officials, etc.

– ***PART VIIa*** - Senior rater makes an assessment of the rated officer's potential to perform duties at the next higher grade in comparison with all other officers of the same grade. The senior rater will enter the total number of officers he or she currently senior rates in that grade. The senior rater will also check the appropriate box concerning receipt of the DA Form 67-9-1.

– ***PART VIIb***

o Senior rater makes an assessment of the rated officer's overall potential in comparison with all other officers of the same grade the senior rater has senior rated and/or are currently in the senior rater's population. This potential is evaluated in terms of the majority of officers in the population. If the potential assessment is consistent with the majority of these officers the senior rater will "x" the CENTER OF MASS box. If the rated officer's potential exceeds that of the majority of officers in the senior rater's population, the senior rater will "x" the ABOVE CENTER OF MASS box. (The intent is for senior raters to use this box to identify the upper third of their officers in each grade.) If the rated officer's potential is below the majority of officers in the senior rater's population for that grade and the senior rater believes the rated officer should be retained for further development, the senior rater will "x" THE BELOW CENTER OF MASS-RETAIN box. If the rated officer's potential is below the majority of officers in the senior rater's population for that grade and the senior rater does not believe the rated officer should be retained on active duty, the senior rater will "x" the BELOW CENTER OF MASS-DO NOT RETAIN box. In order to maintain a valid profile, the senior rater must have less than 50% of the ratings of a particular grade group in the top box. More than 50% in the top box will result in a HQDA label - CENTER OF MASS.

o Senior raters should plan to limit the top box to no more than one third of all ratings in that grade, rather than playing the line at just less than one half. This will ensure maximum flexibility when rating populations change or to preclude a top box check from inadvertently profiling as a CENTER OF MASS rating. For example, if the senior rater is playing the line at just less than one half and his or her best officer suddenly PCSs, the senior rater would have no choice but to give this officer a CENTER OF MASS rating.

o To provide senior raters flexibility when initially establishing a credible senior rater profile, the first single top box report processed against the senior rater's profile at that grade will generate a HQDA label ABOVE CENTER OF MASS, regardless of the actual profile. However, all other reports will receive a HQDA label which reflects the senior rater's profile at the time the report processes.

– ***PART VIIc*** - (Comments are mandatory) Senior rater enters narrative comments in this box which should focus on the rated officer's potential, but will also address performance, the administrative review, or the evaluations of the rater and intermediate rater.

– ***PART VIId*** - (Comments are mandatory) Based on the rated officer's duty performance and demonstrated potential, the senior rater will list three future assignments for which the rated officer is best suited for in the next 3-5 years. Upon implementation of OPMS XXI, senior raters must also enter a recommended Career Field for all Army Competitive Category CPTs through LTCs.

EXAMPLE OF COMPLETED PART VII

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER *(Explain below)*

I currently senior rate 5 officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO (Explain in c)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

[X] ABOVE CENTER OF MASS (Less than 50% in top box; Center of Mass if 50% or more in top box)

[ ] CENTER OF MASS

[ ] BELOW CENTER OF MASS RETAIN

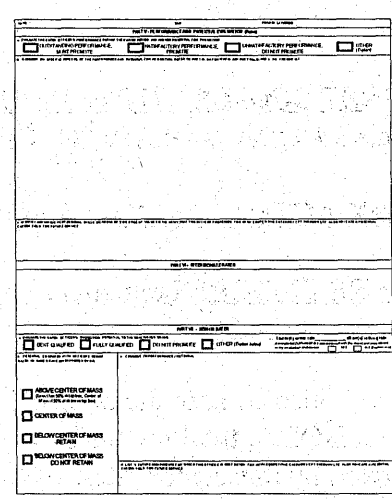
[ ] BELOW CENTER OF MASS DO NOT RETAIN

c. COMMENT ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 5 Captains I senior rate. His performance as battalion S-4 has exceeded my expectations in every respect. This warrior successfully combines a solid grounding in tactics with a keen understanding of the fundamentals of multi-functional logistics to produce first rate combat service support. Due to his exceptional leadership qualities, CPT Buck has been selected to command a Forward Support Supply Company. Select for below the zone to Major and attendance at resident CGSC.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Support Operations Officer, Battalion XO, DISCOM S-3



HQDA LABEL

A senior rater top box check is either ABOVE CENTER OF MASS or CENTER OF MASS, dependent upon the senior rater's profile. The HQDA label overlays the senior rater potential box check, Part VIIb. It is simply a comparison of the senior rater's box check with the senior rater boxes in Part VIIb and/or profile at the time the OER processes at HQDA. This comparison generates a label when the report processes. The label will contain one of these statements: ABOVE CENTER OF MASS, CENTER OF MASS, BELOW CENTER OF MASS - RETAIN, BELOW CENTER OF MASS - DO NOT RETAIN.

KEY RULES

BOX CHECK	LABEL
TOP BOX	ABOVE CENTER OF MASS - The number of ratings in the first box are less than 50% of all ratings, to include the report(s) being submitted, in the profile for that grade. OR CENTER OF MASS - When 50% or more of all ratings, to include the report(s) being submitted, in the profile for that grade are in the first box.
SECOND BOX	CENTER OF MASS - A rating in the second box regardless of the profile.
THIRD BOX	BELOW CENTER OF MASS - RETAIN - A rating in the third box regardless of the profile.
FOURTH BOX	BELOW CENTER OF MASS - DO NOT RETAIN - A rating in the fourth box regardless of the profile.

OTHER RULES

- **FIRST SINGLE TOP BOX REPORT** processed against the senior rater profile at that grade will generate a HQDA label ABOVE CENTER OF MASS regardless of the actual profile.

- **THE ACTUAL BOX** marked by the senior rater ***cannot*** be mentioned in the narrative.

- **OERS PROCESS** together as a batch based on their day of receipt at HQDA. (See Batch Processing, page 30)

The label will also contain the rated officer's and senior rater's grade, name, and SSN, the date the report processed at HQDA, total ratings by the senior rater in that grade and number of times the rated officer has been rated by this senior rater. This information in conjunction with additional information from Part VIIa, will help DA Selection Boards identify senior rater's with small rating populations (3 or less) and weigh the report accordingly.

EXAMPLE OF HQDA LABEL

HQDA Label Process

Senior Rater Checks Top Box in VII b.

Part VII, DA FORM 67-9 completed by Senior Rater

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER *(Explain below)*

I currently senior rate 5 officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO (Explain in C)

b. POTENTIAL COMPARED WITH OFFICERS SENIOR RATED IN SAME GRADE (OVERPRINTED BY DA)

[X] ABOVE CENTER OF MASS (Less than 50% in top box;Center of Mass if 50% or more in top box)

[ ] CENTER OF MASS

[ ] BELOW CENTER OF MASS RETAIN

[ ] BELOW CENTER OF MASS DO NOT RETAIN

c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 5 Captains I senior rate. His performance as battalion S-4 has exceeded my expectations in every respect. This warrior successfully combines a solid grounding in tactics with a keen understanding of the fundamentals of multi-functional logistics to produce first rate combat service support. Due to his exceptional leadership qualities, CPT Buck has been selected to command a Forward Support Supply Company. Select for below the zone to Major and early attendance at resident CGSC.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Support Operations Officer, Battalion Executive Officer, DISCOM S-3

*Box check is compared to the Senior Rater's Profile for CPTs at DA, since less then half in Top box .... **ACOM***

Process at

DA

PROFILE IS

* [2]

[4]

[0]

[0]

TOTAL Ratings [6]

HQDA Label is created based on Senior Rater Profile

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

ABOVE CENTER OF MASS

RO: CPT BUCK, GEORGE 999999999

SR: LTC SMITH 666666666

DATE: 98 11 28

TOTAL RATINGS: 6

RATINGS THIS OFFICER: 1

PART VII - SENIOR RATER

a. EVALUATE THE RATED OFFICER'S PROMOTION POTENTIAL TO THE NEXT HIGHER GRADE

[X] BEST QUALIFIED [ ] FULLY QUALIFIED [ ] DO NOT PROMOTE [ ] OTHER *(Explain below)*

I currently senior rate 5 officer(s) in this grade

A completed DA Form 67-9-1 was received with this report and considered in my evaluation and review [X] YES [ ] NO (Explain in C)

HQDA COMPARISON OF THE SENIOR RATER'S PROFILE AND BOX CHECK AT THE TIME THIS REPORT PROCESSED

ABOVE CENTER OF MASS

RO: CPT BUCK, GEORGE 999999999

SR: LTC SMITH 666666666

DATE: 98 11 28

TOTAL RATINGS: 6

RATINGS THIS OFFICER: 1

c. BULLET COMMENTS ON PERFORMANCE / POTENTIAL

CPT Buck is the best out of 5 Captains I senior rate. His performance as battalion S-4 has exceeded my expectations in every respect. This warrior successfully combines a solid grounding in tactics with a keen understanding of the fundamentals of multi-functional logistics to produce first rate combat service support. Due to his exceptional leadership qualities, CPT Buck has been selected to command a Forward Support Supply Company. Select for below the zone to Major and early attendance at resident CGSC.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Support Operations Officer, Battalion Executive Officer, DISCOM S-3

BATCH PROCESSING

- OERs are processed together as a batch and incremented against the senior rater's profile based on their day of receipt at HQDA. Consequently, all reports in a particular grade from the same senior rater and in the same batch will all process together and have the same profile. ***For example***:

  – The senior rater's profile is "2" in the top box and "4" in the second box. Two top box reports of the same grade arrive from the senior rater at HQDA on the same day. After these two reports are included, the senior rater's profile for both reports will be "4" in the top box and "4" in the second box. Since the top box on both reports is not less than 50% of the profile, both reports will receive a HQDA label- CENTER OF MASS.

  – **However** if the two reports are sequenced to process on different days the first report in the top box will profile "3" in the top box and "4" in the second box. Since the top box is less than 50% this report will receive a HQDA label - ABOVE CENTER OF MASS. The second top box will profile at "4" in the top box and "4" in the second box. Since the top box is equal to 50% of all ratings the report will receive a HQDA label - CENTER OF MASS.

- In order to give a rated officer an ABOVE CENTER OF MASS rating, the number of reports in the top box., to include the report(s) being submitted, must always be less than 50% of the total number of reports in the profile for that grade.

- In the chart at right the first column reflects the total number of reports in a senior rater's profile in a particular grade. The second column shows the minimum number of reports the senior rater can mark as ACOM and still maintain the goal of identifying only the upper 1/3 in the top box. The third column shows the maximum number of reports the senior rater can mark in the top box and still be an ABOVE CENTER OF MASS report when the HQDA label is generated.

- When starting a new profile in a particular grade, the first single top box report processed against the senior rater's profile at that grade will generate a HQDA label ABOVE CENTER OF MASS regardless of the actual profile. However, all other reports will generate a HQDA label reflecting the senior rater's profile at the time the report processes. ***For example:***

  – The senior rater has a "zero" profile and submits a report with the top box marked. The report will profile at "1" in the top box and "0" in the second box. Since the report was the first single top box to process against the senior rater's profile it will receive a HQDA label - ABOVE CENTER OF MASS.

  – The senior rater's profile is "0" in the top box and "1" in the second box. The senior rater submits a report with the top box marked. The report will profile at "1" in the top box and "1" in the second box. Since the report was the first single top box to process against the senior rater's profile it will receive a HQDA label - ABOVE CENTER OF MASS.

EXAMPLE OF BATCH PROCESSING

To give an ACOM rating the number of reports in the top box must always be **LESS THAN 50%** of total reports in your profile!

Example Profile
Current profile is:
2 in top; 4 in second.
Two reports arrive **same day** with top block.
Now: 4 in top; 4 in second
Both Reports COM!

Senior Rater Profile Chart

Total # Reports in profile	ACOM Goal (33%)	Maximum # ACOM
1	0	0 or 1
2	0	0 or 1
3	1	1
4	1	1
5	1	2
6	2 (or less)	2
7	2 (or less)	3
8	2 (or less)	3
9	3 (or less)	4
10	3 (or less)	4
11	3 (or less)	5
12	4 (or less)	5
13	4 (or less)	6
14	4 (or less)	6
15	5 (or less)	7
16	5 (or less)	7
17	5 (or less)	8
18	6 (or less)	8
19	6 (or less)	9
20	6 (or less)	9

Remember...
Reports are batch processed based on day of receipt at HQDA.
Thus, **profile will be the same on all reports in the batch!**

SENIOR RATER PROFILE REPORT

- ***PURPOSE***

– The profile report serves three main purposes. First, it provides senior raters with current information to assist in managing their profile. Secondly, the report provides a historical record and audit trail for the rating official's use. Thirdly, the historical profile information is used as a management tool by DA selection boards to review the senior rater's application of the evaluation system. Three separate profile reports are maintained for a senior rater; a separate report for each of the three different categories of officers that may be in a profile (active duty, USAR, and ARNG).

- ***DESCRIPTION***

– The front side consists of three sections: the top portion provides administrative data; the left side of the form provides current OER profile information (i.e. profile information *since* the last restart); the right side provides historical profile information (i.e. *cumulative*, irrespective of any restarts).

– The reverse side consists of two sections: the top portion provides a chronological, by name, list of all officers senior rated by the rating official and the HQDA label applied to their report. The bottom portion contains instructions for managing the senior rater profile.

- ***USES***

- The profile report is mailed to all senior raters on an annual basis, or made available upon request to US Army PERSCOM, Evaluation Systems Office, at DSN 221-9660 or Commercial (703) 325-9660.

– A copy of the front side of the form is placed in the senior rater's Official Military Personnel File (OMPF).

RESTART RULES

- Senior raters may restart their profile in a particular grade after 3 OERs have processed at HQDA against that grade.

- Restarts are effective the first of the month following the senior rater's restart request.

- Senior rater restarts must be accomplished by direct telephone contact between the senior rater and the Evaluation Systems Office, HQDA. DSN 221-9660, Commercial (703) 325-9660.

- All reports with a senior rater signature date prior to the effective date of the restart will process, profile, and be labeled against the old profile. All reports with a senior rater signature date on or after the effective date of the restart will process, profile, and be labeled against the new profile.

- The senior rater profile restart is designed as a "last resort" mechanism for senior raters who have lost control of their profile. It is not intended for use as a profile management tool. Senior raters have a responsibility to the Army and their officers to establish and maintain a credible profile. Over the long term this provides senior raters greater flexibility in rating their officers.

EXAMPLE OF SENIOR RATER PROFILE REPORT

SENIOR RATER PROFILE REPORT
OFFICER EVALUATION REPORTING SYSTEM
FOR USE OF THIS FORM, SEE AR 623-105; PROPONENT AGENCY IS ODCSPER

A. NAME	B. SSN	C. RANK	D. DATE OF REPORT
JONES, WILLIAM A.	345-67-8901	COL	5 Dec 1999

	CURRENT OER PROFILE					PROFILE HISTORY		
	ACOM COM	COM	BCOM RETAIN	BCOM DO NOT RETAIN	Total Ratings	Total Ratings	1st Block COM	% Total 1st Block
COL								
LTC								
MAJ								
CPT	2	5	0	0	7	10	1	40%
1LT								
2LT								
CW5								
CW4								
CW3								
CW2								
WO1								

DA FORM 67-9-2 1 OCT 97

NAME	RANK	BLOCK	LABEL	PROFILE	THRU DATE	PROC DATE
Smith, D.	CPT	1	ACOM	1-0-0-0	981001	981101
Jones, T.	CPT	1	COM	2-0-0-0	981101	981201
Davis, R.	CPT	2	COM	2-1-0-0	981201	990101
			RESTART CPT			
Black, K.	CPT	1	ACOM	1-0-0-0	990201	990301
Pike, M.	CPT	2	COM	1-1-0-0	990301	990401
Bass, S.	CPT	2	COM	1-2-0-0	990501	990501
Brown, T.	CPT	2	COM	1-3-0-0	990601	990701
Carter, G.	CPT	2	COM	1-4-0-0	990701	990811
Williams, B.	CPT	2	COM	1-5-0-0	990901	990921
Jones, T.	CPT	1	ACOM	2-5-0-0	990801	991001

SAMPLE

DA Form 67-9-2 (Reverse Side)

OFFICER PERSONNEL MANAGEMENT SYSTEM INTERFACE

- **PART Vc and VIId. Career Fields for Army Competitive Category CPT through LTC.**

  – Upon implementation of OPMS XXI, raters and senior raters must enter a recommended Career Field for Army Competitive Category CPTs through LTCs. Recommended Career Fields will be one of several factors taken into consideration during Career Field Designation Boards. Career Field recommendations are based on a combination of factors which embrace the whole person concept. These factors include, but are not limited to: demonstrated performance; undergraduate or graduate training; technical or unique expertise; military experience or training; and in-depth understanding of a foreign culture.

  – Career Field recommendations will be one of three approved OPMS XXI Career Fields; Operational (OP), Information Operations (IO), or Army Management (AM). Raters will state their recommendation in Part Vc and senior raters will state their recommendation in Part VIId. For a detailed description of these career fields and the branches and functional areas that exist in each, refer to the guide "Officer's Guide to OPMS XXI" and DA Pamphlet 600-3 (Commissioned Officer Development and Career Management). Several examples are provided below:

Examples for Part Vc, Unique Skills/Expertise/Career Field

- CPT Espinoza's ability to integrate relevant information is outstanding. He can easily bridge the gap between information technology and combat operations. He will best serve the Army in the Information Operational Career Field.

- CPT Tanaka possesses an uncanny ability to analyze, interpret, and use complex information in tactical situations. Continue service in the Operational Career Field.

- CPT Smith's exceptional modeling and simulation skills saved the Army $2.3 million by completing the Joint Projection Study ahead of schedule. Recommend service in the Army Management Career Field as an Operations Research and Systems Analyst.

- CPT Lee has an intuitive feel for combat operations and her innate leadership skills allow her to consistently make the correct decisions while under pressure. Her decision-making qualities make her ideally suited for the Operational Career Field.

Example for Part VIId, Career Field

- Best suited for future service in the [select one of the three approved OPMS XXI Career Fields].

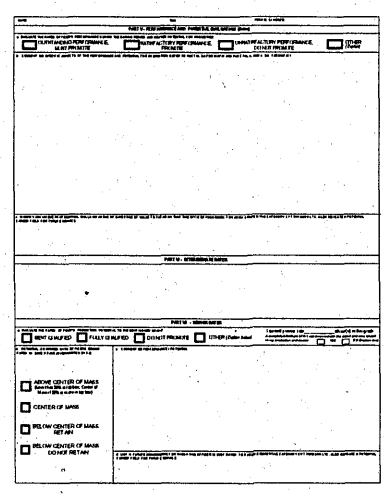
EXAMPLE OF COMPLETED PART Vc AND PART VIId (OPMS Career Field)

c. IDENTIFY ANY UNIQUE PROFESSIONAL SKILLS OR AREAS OF EXPERTISE OF VALUE TO THE ARMY THAT THIS OFFICER POSSESSES. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

CPT Tanaka possesses an uncanny ability to analyze, interpret, and use complex information in tactical situations. He will best serve the Army in the Operational Career Field.

d. LIST 3 FUTURE ASSIGNMENTS FOR WHICH THIS OFFICER IS BEST SUITED. FOR ARMY COMPETITIVE CATEGORY CPT THROUGH LTC, ALSO INDICATE A POTENTIAL CAREER FIELD FOR FUTURE SERVICE.

Support Operations Officer, Battalion XO, DISCOM S-3. Best suited for future service in the Operational Career Field.



By Order of the Secretary of the Army:

DENNIS J. REIMER
General, United States Army
Chief of Staff

Official:

JOEL B. HUDSON
Administrative Assistant to the
Secretary of the Army

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SENIOR RATER TIPS

HQDA LABEL: is a comparison of the senior rater's box check with the senior rater boxes and/or profile at the time the OER processes at HQDA.

So.....

- Know your profile at all times - if in doubt verify with PERSCOM.

- If practical, restructure your rating schemes to preclude small senior rater populations (3 or less) and increase rating flexibility.

- CENTER OF MASS ratings will be the norm, so develop your senior rating philosophy accordingly.

- Use the top box to identify only your very best officers (upper 1/3).

- Rated officer signs the report last, so initiate the OER prior to the "thru" date.

- Except for Selection Board reports, you have 90 days after the "thru" date to submit OERs to HQDA. Use that period to help sequence your reports.

- Board reports must still be submitted to reach HQDA by the "receive not later than" date established in the Board message.

- It is the senior rater's responsibility to ensure all reports arrive at HQDA in the desired sequence; therefore, improperly sequenced reports are not a basis for an appeal.

  - Develop and maintain a rating "cushion". The goal should be no more than 1/3 of your total ratings, at each grade, in the top box.

  - Sequence your reports so the top box is always less than 50%, otherwise no ACOM ratings.

  - Senior rater restarts are authorized only after 3 reports have processed at HQDA in a specified grade. However, over the long term, it's more advantageous to establish and maintain a credible profile.