

VOLUME II
GUIDEBOOK
FOR
OFFICER SELECTION OFFICERS
2016 EDITION



THIS PAGE INTENTIONALLY LEFT BLANK



UNITED STATES MARINE CORPS

MARINE CORPS RECRUITING COMMAND
3280 RUSSELL ROAD
QUANTICO, VA 22134-5103

1130
NTT

From: Commanding General
To: Distribution List

DEC 11 2015

Subj: VOLUME II: GUIDEBOOK FOR OFFICER SELECTION OFFICERS, 2016
EDITION

1. Situation. Volume II: Guidebook for Officer Selection Officers provides information on the organization, duties, and procedures used in the Officer Selection Station.
2. Cancellation. Guidebook for Officer Selection Officers, Volume II of 2014.
3. Mission. This Guidebook sets forth doctrine, procedures, and techniques for the recruiting operations conducted at the Officer Selection Station level.
4. Execution. MCO 1130.76 establishes the contents of this Guidebook as official Marine Corps doctrine for the conduct of Officer Selection Station (OSS) operations. Any conditions or modifications to the procedures and forms contained in this Guidebook will not be made without prior written approval of the Commanding General, Marine Corps Recruiting Command.
5. Administration and Logistics. Recommendations concerning the contents of this Guidebook may be forwarded to CG, MCRC (AC/S G3) via the appropriate chain-of-command.
6. Command and Signal
 - a. Command. This Guidebook is applicable to the Marine Corps Recruiting Command.
 - b. Signal. This Guidebook is effective the date signed.


M. A. BRILAKIS

THIS PAGE INTENTIONALLY LEFT BLANK

GUIDEBOOK FOR
OFFICER SELECTION OFFICERS
VOLUME II
RECORD OF CHANGES

Log completed change action as indicated.

CHANGE #	CHANGE DATE	DESCRIPTION OF CHANGE	SIGNATURE

THIS PAGE INTENTIONALLY LEFT BLANK

TABLE OF CONTENTS

<u>CHAPTER</u>	<u>TITLE</u>	<u>PAGE</u>
Chapter 1:	GENERAL	1-1
Chapter 2:	INTRODUCTION TO SYSTEMATIC RECRUITING	2-1
Chapter 3:	OFFICER SELECTION TEAM TRAINING AND EVALUATION	3-1
Chapter 4:	PRODUCT KNOWLEDGE	4-1
Chapter 5:	HOW TO COLLECT DATA, ANALYZE DATA, AND SET OBJECTIVES	5-1
Chapter 6:	HOW TO CREATE AN ANNUAL PLAN	6-1
Chapter 7:	HOW TO CONDUCT A MARKET ANALYSIS	7-1
Chapter 8:	HOW TO WORK THE COLLEGE RELATIONS PROGRAM	8-1
Chapter 9:	HOW TO USE YOUR SALES TOOLS	9-1
Chapter 10:	HOW TO WORK A PROSPECT USING THE PROSPECT APPLICANT CARD (PAC)	10-1
Chapter 11:	TELEPHONE (TC) TECHNIQUES AND HOW TO CONDUCT TC PROSPECTING	11-1
Chapter 12:	HOW TO AREA CANVASS (AC) PROSPECT AND CONDUCT PRESENTATIONS	12-1
Chapter 13:	HOW TO USE THE OFFICER PRIORITY PROSPECT CARD (OPPC) PROGRAM	13-1
Chapter 14:	HOW TO USE PHYSICAL AND ELECTRONIC MAILOUTS	14-1
Chapter 15:	HOW TO WORK WITH A SELECTED MARINE CORPS RESERVE (SMCR) UNIT	15-1
Chapter 16:	HOW TO MAINTAIN AN EFFECTIVE POOL PROGRAM	16-1
Chapter 17:	CANDIDATE SHIPPING, INDUCTION AT OCS, AND POST-OCS REQUIREMENTS	17-1
Chapter 18:	HOW TO WORK THE OSO COMMAND RECRUITING PROGRAM	18-1
Chapter 19:	HOW TO DEVELOP AND WORK PROFESSIONAL CONTACTS	19-1
Chapter 20:	HOW TO SET UP AN OFFICER SELECTION STATION	20-1
Chapter 21:	COMMISSIONING	21-1
APPENDIX A:	SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST	A-1
APPENDIX B:	OSO MOJT CHECKLIST AND EVALUATION SUMMARY	B-1

Volume II, Guidebook for Officer Selection Officers, 2016 Edition

APPENDIX C:	OSA MOJT CHECKLIST AND EVALUATION SUMMARY	C-1
APPENDIX D:	GLOSSARY	D-1
APPENDIX E:	MARINE OFFICER PROGRAMS ROUGH APPLICATION	E-1
APPENDIX F:	AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM/ ACP CHECKLIST/MCRISS CONTRACTING PROCESS	F-1
APPENDIX G:	OST YEARLY BATTLE RHYTHM	G-1
APPENDIX H:	MONTHLY ACTIVITY REPORT	H-1
APPENDIX I:	DATA ANALYSIS WORKSHEET	I-1
APPENDIX J:	OBJECTIVES SHEET	J-1
APPENDIX K:	PROSPECTING PLANNING MATRIX	K-1
APPENDIX L:	CANDIDATE RECORD	L-1

CHAPTER 1

General

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	1001	1-2
MISSION	1002	1-2
THE OFFICER PROCUREMENT PROCESS	1003	1-2
OVERVIEW OF OFFICER PROGRAMS	1004	1-5
OFFICER PROCUREMENT STRUCTURE	1005	1-6
COMMAND RELATIONSHIPS	1006	1-8
SYSTEMATIC RECRUITING	1007	1-11
OFFICER SELECTION OFFICER (OSO) TASKS AND FUNCTIONS	1008	1-11
OFFICER SELECTION ASSISTANT (OSA) TASKS AND FUNCTIONS	1009	1-11
HUMAN RESOURCE ASSISTANT (HRA) TASKS AND FUNCTIONS	1010	1-12

Chapter 1

General

1001. GENERAL. This Guidebook establishes the mission, organization and doctrine for Marine Corps Officer Selection Station (OSS) recruiting operations. The Volume II is designed to provide guidance FOR the planning and conduct of recruiting operations to the Marines assigned to recruiting duty. This Guidebook will be used in conjunction with the Volume III, Guidebook for Recruiting Station (RS) Operations, and MCRCO 1100.2_ Officer Commissioning Manual (OCM).

1. Officer Selection Officer (OSO) duty is one of the most challenging duties a Marine officer may experience. It is imperative the OSO professionally execute the duties of this billet.

2. As an OSO, you will have a quantifiable mission that you will be expected to execute successfully. Coming from the operational forces, and now outside of your Military Occupational Specialty (MOS), you must understand that that you, along with your Office Selection Assistant (OSA), will be the sole representatives of the Marine Corps in your area of responsibility.

1002. MISSION. The mission of the OSO is to commission fully trained officer candidates to the grade of second lieutenant. OSOs will accomplish this by:

1. Attaining annual missions to include; submission, shipping, and induction at Officer Candidate School (OCS), for the Platoon Leaders Class (PLC) program by component/year group, and category [e.g. PLC 15 Air (PLC 15A)] and the Officer Candidate's Course (OCC) program by component/class, and category [e.g. OCC 217 Air (OCC 217A)]. OSOs must also attain their female and diversity goals (e.g. African American, Hispanic, and Other).

2. Ensuring that all candidates are mentored, trained, and prepared to succeed at Officer Candidate School (OCS).

3. Ensuring that all officer candidates maintain their mental, moral, medical and physical qualifications to continue their involvement in the PLC or OCC programs. OSOs will strive to ensure that PLC Seniors return to OCS to complete training.

4. Assisting in the preparation of all second lieutenants reporting to the Basic School (TBS).

1003. THE OFFICER PROCUREMENT PROCESS.

1. Mission Assignment. The process below is an overview of the officer mission assignment process.

a. Congress prescribes officer end-strength requirements to the Deputy Commandant for Manpower and Reserve Affairs (DC, M&RA) who delegates attainment of this requirement to Marine Corps Recruiting Command (MCRC). MCRC uses the officer end-strength requirements to determine a percentage of officers to be accessed from the following sources.

(1) Active Duty Officer Programs including: OCC and PLC Programs, Military Service Academies, Naval Reserve Officer Training Corps (NROTC), the Marine Enlisted Commissioning and Education Program (MECEP) and the Enlisted

Commissioning Program (ECP).

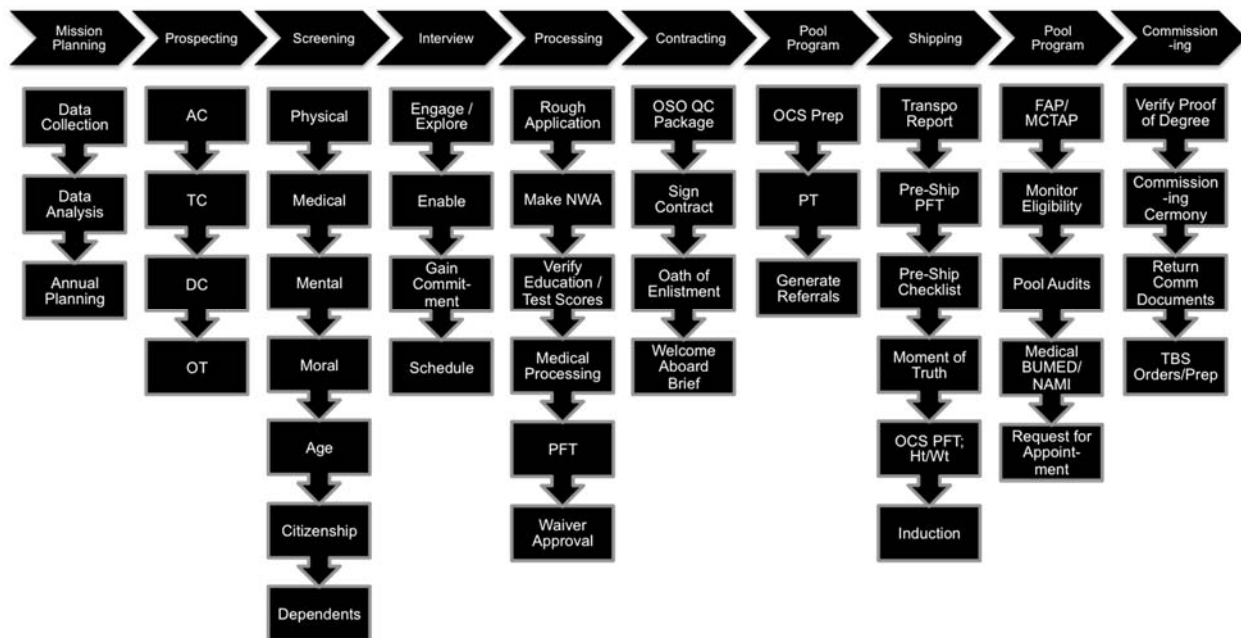
(2) Reserve Officer Programs including: OCC-R, the Reserve Enlisted Commissioning Program (RECP), and the Meritorious Commissioning Program-Reserve (MCP-R).

b. MCRC assigns each region with a PLC and OCC mission based on the national Qualified Candidate Population (QCP). The Regions then assign each Marine Corps District (MCD) with a PLC and OCC mission based on the QCP of each MCD.

c. Each MCD assigns each Recruiting Station (RS) with a PLC and OCC mission based on the QCP of each RS. The RS Commanding Officer (RSCO) will then assign each OSO RS their mission.

2. Officer Procurement Process. Once the OSO receives the annual mission, there are a number of planning activities which must take place before the mission can be accomplished. [Figure 1-1](#) depicts the PLC and OCC procurement process from mission planning through commissioning.

Officer Procurement Process



[Figure 1-1](#) - Officer Procurement Process

a. Mission Planning. Mission planning involves mission analysis, market analysis, and annual planning.

(1) Mission Analysis. Mission analysis includes analyzing the assigned mission in regard to the specific measures required to accomplish the various components/year groups, and categories of the mission. This involves a comparison of the current mission with previous years' mission attainment.

(2) Market Analysis. The OSO must conduct a detailed assessment of

the market located within the OSS's Area of Operations (AO) to determine the focus of effort for the recruiting year. OSOs will evaluate factors such as travel time to colleges/universities, size and demographic makeup of the college student populations (including diversity populations by race and ethnic category), quality indicators [e.g. standardized test scores, Physical Fitness Test (PFT) scores, Grade Point Averages (GPA), etc...], student organizations that have potential for identifying prospects, existence of supportive faculty members and administrators, availability of resources [Marine Corps Recruiting Sub-Stations (RSS), Select Marine Corps Reserve (SMCR) units, Naval Reserve Officer Training Corps (NROTC)], and the number of poolees at each school. A careful analysis of past years' plans and results is crucial in order to be effective.

(3) Annual Planning. The OSO must create a detailed annual plan which addresses each component/year group and category of the assigned recruiting mission. The foundation of the OSO's annual plan is an aggressive college relations program and campus visit schedule that focuses on historically difficult mission categories (e.g. aviators, females, and diversity). The plan must include specific activities and objectives to achieve all elements of the assigned mission. Input from the entire Officer Selection Team (OST) and review by the RSCO and Marine Corps District (MCD) Assistant for Officer Procurement (AOP) is essential. Additionally, a plan to visit colleges and universities on a consistent basis is vital for success and is one of the hallmarks of a solid annual plan.

b. Prospecting. Prospecting consists of all activities which result in contacting potential applicants for officer commissioning programs. These activities are the primary focus of the OST throughout the entire year. It is important to prospect continuously throughout the entire year to ensure the OST maintains a constant flow of applicants. Well planned and executed prospecting is directly proportional to the number of contracts written. Prospecting is a continuous team effort.

c. Screening. OST members must carefully screen for any physically, medically, mentally, or morally disqualifying conditions prior to scheduling an appointment/interview with a prospective applicant. Meticulous screening will save the OST and the applicant time by ensuring the OST only interviews qualified applicants. Prospective candidates should be screened at least twice prior to a sales interview. The first screening should occur upon initial contact and the second at the appointment; however, screening is continuous throughout the contact-to-contract chain.

d. Selling/Interviewing. After the OST properly screens an applicant, the OSO or OSA will conduct a personal interview with the prospective applicant and present a sales presentation in accordance with the Marine Corps Communication and Consulting (MC3) skills and sales tools.

e. Processing. Processing includes the management of New Working Applicants (NWAs) through the processing chain; the results of which are a contracted applicant. The OSO will review all applications for accuracy, ensure they possess all required documentation, and ensure timely submission to MCD. The OSO must drive production in a manner which allows an officer application to be complete and submitted ahead of assigned phase lines and/or board deadlines.

f. Contracting. Contracting is a scheduled session at which the applicant signs the required documents [e.g. Department of Defense Form 4

(DD4) and Annexes] that constitute contractual obligations on the part of both the applicant and the Marine Corps. The OSO will only contract applicants that are mentally, morally, medically, and physically qualified for the program which they are applying (this includes the approval of all waivers). OSOs will contract applicants in accordance with MCRCO 1100.2_ OCM.

g. Pool Management. The pool includes contracted applicants, contracted candidates selected to attend OCS, once-trained candidates, fully-trained candidates, and second lieutenants awaiting TBS. The OST must conduct activities to ensure the pool maintains their motivation, physical fitness, mental toughness, moral obligations, and administrative readiness for OCS and TBS. Pool management also includes conducting semi-annual pool audits and ensuring candidates maintain program qualifications in accordance with the OCM.

h. Shipping. Shipping is the act of ensuring selected candidates report to OCS, with all required documentation, and are prepared to induct into training.

i. Commissioning. Commissioning encompasses the processing of appropriate documentation, scheduling the commissioning ceremony, confirming graduation requirements prior to the ceremony, and conducting the ceremony in accordance with the OCM.

1004. OVERVIEW OF OFFICER PROGRAMS. The information below is an overview of the PLC and OCC programs. For more detailed information regarding these programs, refer to Chapter 4 of this Guidebook and MCRCO 1100.2_, OCM.

1. PLC Program. PLC is the officer program for full-time enrolled undergraduate college students attending accredited four year colleges or universities (students enrolled in community college are eligible for the PLC Program; refer to MCRCO 1100.2_ OCM). Upon completion of prescribed training and academic requirements, candidates are commissioned as second lieutenants and assigned to active duty for instruction at TBS. College freshmen and sophomores attend two, six-week increments of training called PLC Juniors and PLC Seniors. Selected freshmen attend PLC Juniors during the summer before their sophomore year, and sophomores attend PLC Juniors during the summer before their junior year. Regardless of whether they were selected as a freshman or a sophomore, candidates attend PLC Seniors during the summer prior to their senior year. Selected college juniors will attend (one) ten-week training session, called PLC Combined, at OCS between their junior and senior year. PLC applicants may apply for one of the four categories below:

- a. PLC Ground
- b. PLC Student Naval Aviator
- c. PLC Student Naval Flight Officer
- d. PLC Law

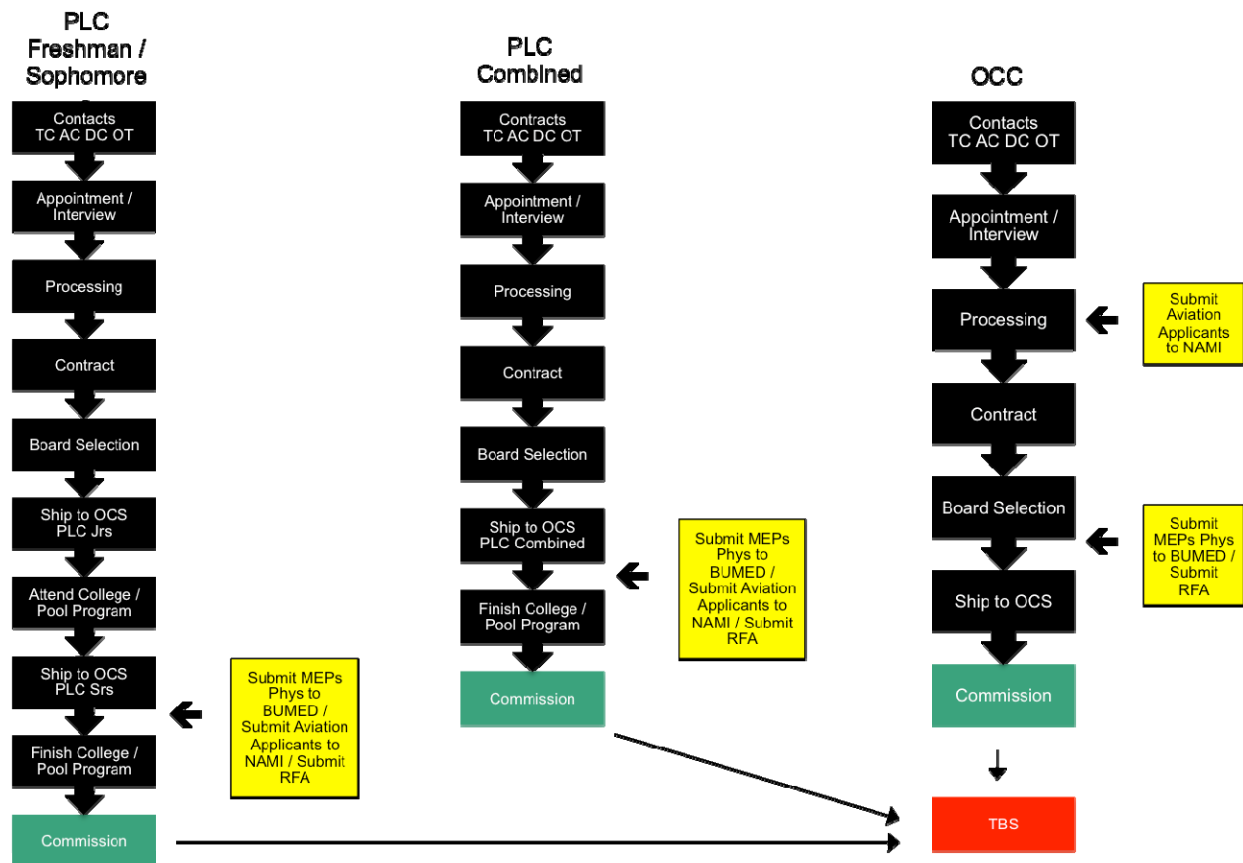
2. OCC Program. OCC is the officer program for applicants who are currently seniors or graduates of a nationally or regional accredited college or university; law school graduates must be admitted to a state bar association. Upon completion of academic requirements, and (one) ten-week session at OCS, candidates are commissioned as second lieutenants and are assigned to active duty for instruction at TBS. Applicants for the OCC Program may apply for

one of the five components below:

- a. OCC Ground
- b. OCC Student Naval Aviator
- c. OCC Student Naval Flight Officer
- d. OCC Law
- e. OCC Reserve

3. The officer selection process for PLC and OCC is depicted in [Figure 1-2](#).

Contact-to-Commissioning Chain for Officer Programs



[Figure 1-2](#) - The Contact-to-Commissioning Chain for Officer Programs

1005. OFFICER PROCUREMENT STRUCTURE. MCRC is responsible for all recruiting activities within the Marine Corps. The officer procurement process is undertaken, managed, and supported at five different levels within MCRC as depicted in [Figure 1-3](#).

1. The five levels within MCRC are:

- a. Officer Selection Station (OSS)
 - b. Recruiting Station (RS)
 - c. Marine Corps District (MCD)
 - d. Eastern Recruiting Region/Western Recruiting Region (ERR/WRR)
 - e. Marine Corps Recruiting Command (MCRC)
2. The Officer Selection Station (OSS) consists of the following:
- a. Officer Selection Officer (OSO) (1stLt-Capt)
 - b. Officer Selection Assistant (OSA) (Sgt-MSgt, 8412, 8411 by exception)
 - c. Human Resources Assistant (HRA) (GS 05-07)
3. The RS is organized to plan, direct, control and support recruiting operations. The RS consists of a command group and support sections. For a detailed description of the Command Group and support sections refer to the Volume III, Guidebook for RS Operations. The RS command group consists of the following:
- a. Commanding Officer (CO) (Maj)
 - b. Executive Officer (XO) (1stLt/Capt)
 - c. Operations Officer (OpsO) (1stLt/Capt)
 - d. OSO (1stLt/Capt)
 - e. Sergeant Major (SgtMaj)
 - f. Recruiter Instructor (RI) (GySgt-MGySgt)
 - g. Assistant Recruiter Instructor (ARI) (GySgt/MGySgt)
4. The MCD headquarters is responsible to the Region for their assigned mission. The MCD tracks OSS mission progress, assists the RS in providing training, and provides administrative support to assist the OSO in the attainment of his/her mission. For a detailed description of the District Command Group and support sections refer to the Volume V, Guidebook for District Operations. Key MCD personnel relative to officer procurement include:
- a. Commanding Officer (CO) (Col)
 - b. MCD Recruiting Operations Officer (DROO) (LtCol)
 - c. Assistant for Officer Procurement (AOP) (Maj)
 - d. Aviation Assistant for Officer Procurement (AAOP) (Capt-Maj)
 - e. Assistant for Officer Procurement Training Chief (AOPTC) (GySgt)
 - f. Assistant for Officer Procurement Operations Chief (AOPOC) (MSgt)

- g. Medical Representative (HM2-HMC)
- h. Human Resource Assistant (GS-07)

5. The Regions are responsible to MCRC for their assigned mission. The primary function of the Region is to issue, track, and monitor the mission assigned by MCRC. Key Region personnel relative to officer procurement include:

- a. Region Assistant for Officer Procurement (RAOP) (Maj)
- b. Region Aviation Assistant for Officer Procurement (RAAOP) (Capt)
- c. Region Assistant for Officer Procurement Chief (RAOPC) (MSgt- MGySgt)
- d. Region Human Resource Assistant (HRA) (GS-07)

6. MCRC. The Officer Programs (OP) section of MCRC is responsible for MCRC's officer mission. The primary function of OP is to attain the officer accession mission designated by Manpower and Reserve Affairs (M&RA). OP acts as a liaison to numerous agencies within and outside the Marine Corps. OP maintains oversight of all accession sources, provides policy and related guidance to the field, and assists in the training of subordinate levels within MCRC. MCRC OP consists of the following staff:

- a. Head, Officer Programs (LtCol)
- b. Deputy, Officer Programs (GS-12)
- c. Head, Regular Officer Programs (Capt)
- d. Head, Reserve Officer Programs (Capt)
- e. Head, Officer Appointments (CW02-CW03)
- f. Officer Programs Chief (MSgt)
- g. OCS Liaison (MSgt)

1006. COMMAND RELATIONSHIPS. Understanding and cooperation among the Marine Corps team is the key to finding quality applicants for the enlisted and officer missions. The OSO, Marine Officer Instructor (MOI), Inspector/Instructor (I&I), RS Command Group, and Recruiting Sub-Station (RSS) Staff Non-Commissioned Officer in Charge (SNCOIC) can provide mutual support that enables the Marine Corps to continue to recruit quality enlisted/officer applicants. This concept is known as "total force" recruiting.

1. The OST is operationally and administratively attached to the RS. The RS CO is the OSO's reporting senior and is responsible for the attainment of the assigned officer mission. The RS CO is also responsible for the assignment of an OSA to the OST.

2. OSOs and enlisted recruiters operate in different markets but are both working toward the RS's annual mission requirements. A professional relationship will exist between the OST and enlisted recruiters. The RSS has high visibility within the local community and can be a source of qualified

referrals. Conversely, the OST often generates leads which are not qualified for an officer program but are qualified for enlistment. A two-way referral system will be established within the RS.

3. RS Support Sections. The sections listed below are in place to support both enlisted and officer recruiting. For a detailed explanation of the different sections of the RS, refer to the Volume III, Guidebook for RS Operations.

a. Operations Section. The operations section is responsible for controlling the enlistment of all applicants, tracking the RS enlisted pool, and controlling all shipping to the recruit depots. Additional responsibilities include: collecting, collating, and displaying recruiting data for analysis by the RS Command Group. In addition to tracking any OSS related data the RSCO may prescribe, the operations officer is responsible for entering the OST's mission in MCRISS-OSS.

b. Recruiter Instructor. The Recruiter Instructor is a command group member, career recruiter (8412) who works directly for the Commanding Officer. His/her primary duty is to function as a member of the command group and to continually provide training and assistance to the entire recruiting force, which includes the Officer Selection Team. The RI is responsible for ensuring the OST maintains, understands, and utilizes the components of systematic recruiting throughout the officer procurement process.

c. Military Entrance Processing Station (MEPS) Liaison Section. The MEPS is part of the Military Entrance Processing Command (MEPCOM). MEPS is responsible for processing and enlisting individuals into the armed forces, and shipping them to recruit training. The MEPS Liaison Non-Commissioned Officer is responsible to the RSCO for ensuring applicants who enlist or ship to recruit training meet the standards for entry into the Marine Corps. Support for the OST includes:

- (1) Medical processing for officer candidates
- (2) Scheduling consults
- (3) ASVAB testing support

d. Administrative Section. The RS Admin Section handles all traditional administrative matters within the RS. Support for the OST includes:

- (1) General administrative support
- (2) Travel orders/Defense Travel System (DTS) support
- (3) Permissive Temporary Assignment of Duty (TAD) officer administration
- (4) Miscellaneous administration

e. Supply Section. The Supply Section is responsible for all financial and logistical matters in support of the RS. Support from the supply section will include:

- (1) Pool events/Pre-OCS training (including funding)

- (2) Temporary Additional Duty (TAD) funding
- (3) Advertising Funds
- (4) Recruiter Out of Pocket Expense (ROPE) claims
- (5) Postal account
- (6) Office equipment and furniture
- (7) Vehicle support
- (8) Cell phones and other mobile devices
- (9) T/O equipment (colors, photos of chain of command, etc.)

f. Marketing and Public Affairs (MPA) Section. The MPA manages the overall advertising and media program in support of the RS. Support from the Marketing and Public Affairs section includes:

- (1) Advertising and media support
- (2) Incentive items
- (3) DVD library
- (4) Collateral material

4. Communication with the RS Command Group.

a. The OSO must maintain regular contact with the RSCO. It is imperative that the OSO take a proactive approach toward keeping the RSCO informed of the OST's activities. Additionally, developing relationships and maintaining rapport with the RS command group and recruiting force is essential to attaining the enlisted and officer mission.

b. Possible OSS/RS integration could include:

- (1) Scheduled phone calls/e-mails on a regular basis
- (2) Weekly updates on the progress of the OSS mission
- (3) Participation in monthly Command Group Action Planning (CGAP) or matrix meetings (See Vol III)
- (4) Participation in monthly/quarterly Refresher and Reinforcement (R&R) Training
- (5) Providing requirements to the annual budget planning to ensure the needs of the OST are met
- (6) Participation in SNCOIC meetings
- (7) Assisting the RSCO in establishing and maintaining an incentive program to recognize referrals between the RSS' and the OSS
- (8) Participation in Performance and Review (PAR) Training

1007. SYSTEMATIC RECRUITING. Systematic Recruiting is an organized and well thought out approach that assists the OST in performing actions necessary to effectively achieve its assigned contracting and shipping missions. Refer to Chapter 2 of this Guidebook for further guidance regarding systematic recruiting.

1008. OSO TASKS AND FUNCTIONS. Communication between OST members, combined with a clear understanding of each member's role(s) in accomplishing the below tasks, is key to mission accomplishment. An understanding of the systematic recruiting components is essential. An OSO is responsible for ensuring the following tasks are understood, supervised, and accomplished. An OSO will take into account the OST members' individual strengths and weaknesses before delegating tasks. A few of the OSO's key tasks include:

1. Mission Planning
2. Prospecting
3. Generating New Working Applicants (NWAs)
4. Processing
5. Contracting
6. Preparing and Maintaining the Pool Program
7. Shipping Candidates to OCS
8. Commissioning
9. Shipping Lieutenants to TBS
10. Training all OST members

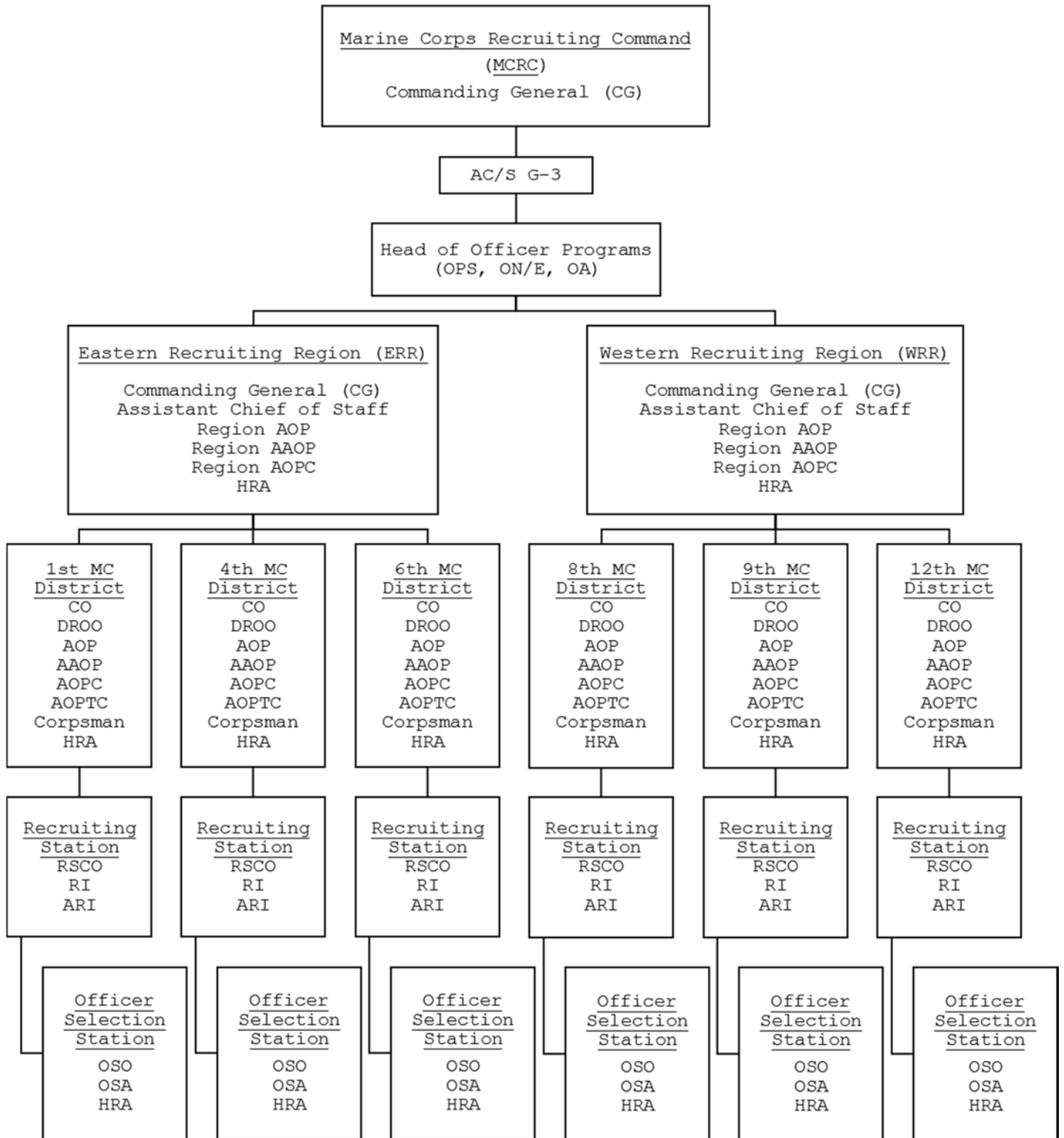
1009. OSA TASKS AND FUNCTIONS. In line with the 8412 roadmap, OSAs are 8412 Career Recruiters (8411 Basic Recruiter by exception. This Marine will not be a sub-standard canvassing recruiter or a Marine who is nearing the end of time-on-station requirements). As an experienced career recruiter, the 8412 brings knowledge of, and experience with, the systematic recruiting process to the Officer Selection Team. A skilled OSA will be involved in nearly every aspect of the OST's activities. An OSA's strengths should lie in the below areas:

1. Systematic Recruiting
2. Prospecting
3. Screening
4. Sales
5. Processing
6. Pool Management

1010. HUMAN RESOURCE ASSISTANT (HRA) TASKS AND FUNCTIONS. The HRA position

provides administrative expertise, database management, relationship development, and continuity to the OST. Refer to the Position Description (PD) of the HRA position for additional details regarding the HRA's responsibilities. An experienced HRA will be involved in most of the OST's activities. The HRA will be highly involved in:

1. Verifying Applicant/Candidate Eligibility
2. Applicant/Candidate Processing
3. Pool Administration
4. OST Administrative Requirements



AOP - Assistant to Officer Procurement
 AAOP - Aviation AOP
 AOPC - AOP Chief
 AOPTC - AOP Training Chief

HRA - Human Resources Assistant
 DROO - District Recruiting Operations Officer
 RI - Recruiter Instructor
 ARI - Assistant RI

CHAPTER 2

Introduction to Systematic Recruiting

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	2001	2-2
SYSTEM ELEMENTS	2002	2-2
SYSTEMATIC RECRUITING COMPONENTS	2003	2-2

Chapter 2

Introduction to Systematic Recruiting

2001. GENERAL. The goal of systematic recruiting is to organize the OST's efforts to attain the required contacts, appointments, interviews, and contracts. It is the system which assists the OST in developing effective annual, monthly, weekly and daily plans. Systematic recruiting focuses the OST on those activities and programs that are vital to effective recruiting and mission attainment. Systematic recruiting requires the maintenance and utilization of 13 components. OSOs will utilize the components to focus and drive production through the gathering and organization of contacts, conducting prospecting activities, conducting appointments and interviews, processing applicants, conducting OST administration, training, and pool management. Combining a solid MC3 skill set, with systematic recruiting, will enable an OST to efficiently and effectively achieve its assigned mission on a consistent basis.

1. Systematic Recruiting and MCRISS (Marine Corps Recruiting Information Support System). Systematic recruiting is the process the OST will utilize to achieve its mission; MCRISS is a tool the OST will utilize to manage the process. While MCRISS-OSS (MCRISS-Officer Selection Station) continues through the improvement/transition period, it will be necessary for the OST manage efforts between physical systematic components and MCRISS. As defined throughout this chapter, the OST will be required to maintain specific aspects of the systematic recruiting components as a physical copy vice electronic copy in MCRISS.

2002. SYSTEM ELEMENTS. Systematic recruiting consists of five elements.

1. Organization. The OSO must organize assets, territory and efforts. This is critical to the efficient functioning, and ultimately, the success of the OST.

2. Standardization. Standardization provides the means for the same procedures, definitions, and systems to be used in each OSS.

3. Management. Systematic recruiting establishes procedures for the collection and analysis of critical information. Proper management of systematic recruiting will assist an OST in efficiently achieving its mission.

4. Training. Training is an ongoing process during an OSO's tour. Once an OSO has identified the team's strengths and weaknesses, and has standardized the OST's business practices, the OSO can determine the team's training needs to establish a training plan. OST training may be conducted internally or with support from higher headquarters, but the key to success is continual training.

5. Action. Systematic recruiting provides an action plan to ensure efforts are focused in areas which will generate contacts, appointments, interviews, and contracts.

2003. SYSTEMATIC RECRUITING COMPONENTS. There are 13 components of officer systematic recruiting. This chapter will provide a basic description of the components each OST will maintain within the modules of the MCRISS-OSS. The 13 components of officer systematic recruiting are:

- Application Files
- Assets Map
- Mission Board
- NWA Board
- Management Book
- OSA Schedule and Result Book (OSA S&R)
- Prospect Board Module
- Officer Priority Prospect Card (OPPC)
- Working File
- Pool Board
- Programs Book
- Training File
- Profile Progress Data

1. Application Files. Officer applications are compiled as a hard copy and input into the Automated Commissioning Package (ACP) program for storage and submission. (Refer to the ACP Training Manual on the MCRISS homepage for details regarding how to use ACP.) The Application Files are the residual hard-copies of applications that are both currently being worked, and are closed out.

a. New Working Applicant File. The New Working Applicant File is the central location where the OST stores all documents for the OST's applicants who have committed to applying for an officer program. As the OST receives documents, they are checked off on the application checklist within MCRISS-OS, as well as on the New Working Applicant Board within the OSS (see 2003.4).

b. Candidate File. The Candidate File is a residual hard-copy of the documents that are uploaded and stored in ACP for all poolees after an applicant signs the contracts for their application.

c. Closed Applicant/Candidate File. The Closed Applicant/Candidate File contains documents of individuals who initiated an application but either did not complete the process, or were denied acceptance. OSTs will maintain records for three years. Maintaining the Closed Applicant/Candidate File supports the recruiting mission in multiple ways:

(1) The OST maintains the records in case an applicant returns to initiate a second application.

(2) The OST may periodically review the Closed Applicant/Candidate File to follow up with previously interested applicants.

(3) The OST may use the Closed Applicant/Candidate File for referrals to local Recruiting Sub-Stations (RSSs).

2. Assets Map. The Assets Map will be displayed prominently in the office. It shows the area in which the team operates and the location of all the OST's resources. The assets map is a useful tool when developing the annual plan and it serves to constantly remind the OST that effective time management skills are essential when scheduling appointments and school visits. The map legend illustrates key resources. Examples include the location of the: OSS, RS (RS), Recruiting Sub-Stations (RSS'), MEPS, Mobile Examination Test (MET) sites, and all colleges/universities (Priority 1, 2, 3 and non-working). The MCRC standard legend is:

LEGEND

- OSS - WHITE PIN
- RS - GOLD PIN
- MEPS - PINK PIN
- RSS/PCS - BLACK PIN
- SMCR/MTU - PURPLE PIN
- NROTC - BLUE PIN
- MET SITE - ORANGE PIN
- NON-WORKING SCHOOL - RED PIN
- PRI 1 SCHOOL - GREEN FLAG
- PRI 2 SCHOOL - YELLOW FLAG
- PRI 3 SCHOOL - RED FLAG
- COMMUNITY COLLEGE - WHITE FLAG

3. Mission Board. The OST will maintain a physical Mission Board in the OST; the Mission Board will reflect the OST's assigned mission and progress by component, category, and year group. The physical mission board serves as a constant reminder of the OST mission and progress. It matches the mission exactly as assigned by the RSCO; it matches the OST's annual plan; and, it displays the mission attainment results for the FY. In addition to the physical Mission Board, the OSO will maintain the Mission Board in MCRISS-OSS; the Mission Board in MCRISS-OSS will match the physical Mission Board. Guidance for utilizing the MCRISS-OSS Mission Board Module is located in the MCRISS User Manual on the MCRISS homepage.

4. New Working Applicant Board (Working NWAs). The NWA Board is physical board hanging on the wall in the OST; it serves as a constant reminder of processing priorities and requirements. The OST uses this board to drive processing to reduce the time it takes to get an NWA through the processing chain. This board lists all NWAs as they are claimed in chronological order by the date the applicants started working. This board is updated as changes occur. The OSO/OSA will fill in all required information on the New Working Applicant Board, recording any changes and/or progression for each NWA. As processing milestones are completed and documents are received, the OSO/OSA will place an "X" in the appropriate block of the NWA Processing Board. Upon receipt of all required documents, the OST schedules the applicant for contracting. In addition to the physical board, there is an NWA Checklist feature in MCRISS-OS (NWA view) that allows OST members to track what processing has been completed for each individual applicant; this NWA View in MCRISS-OS is different than the NWA Board in MCRISS-OSS. The NWA Board in MCRISS-OS (NWA View) will match the physical NWA Board in the OSS. Guidance for utilizing the NWA Modules in MCRISS are located in the MCRISS User Manual on the MCRISS homepage.

5. Management Book. The Management Book is an action oriented management tool used to systematically drive the OST toward mission accomplishment. The OSO will maintain a physical management book; however, specific elements (detailed below) will be maintained in MCRISS-OSS. The Management Book is the data collection point for the information required for the OST to conduct data analysis. Guidance for utilizing the MCRISS-OSS Management Book Module is located in the MCRISS User Manual on the MCRISS homepage. The Management Book is divided into the following seven sections:

a. Plans Section. This section is used to track and schedule all events/activities that take place for an OST during any given day. It contains the OST's daily plans, month-in-sight and annual plan. Refer to the MCRISS User Manual for details on utilizing the Annual Plan, Month-in-Sight, and Daily Plan/Schedule Function.

(1) Annual Plan. The Annual Plan is the OST's systematic approach toward accomplishing its mission. It consists of the various worksheets identified in Chapter 6, 12 monthly calendars with scheduled events for the current mission year, and a cover letter signed by the RSCO. The calendars show all known commitments, specific recruiting activities, school visit plans, shipping dates, phase-line dates, training dates and all other known recruiting activities. As the year progresses, these calendars are used to annotate any additions or changes to the month-in-sight plan. The OST will maintain a physical copy of the annual plan in the management book; entering data from the annual plan on the worksheets in MCRISS-OSS will assist the OST in creating the OST's Month-in-Sight and Daily Plans.

(2) Month-in-Sight (MIS). The current month's calendar from the Annual Plan is the basis for the month-in-sight. The OSO updates the month-in-sight as events occur, or are scheduled; this will assist the OST in planning for upcoming prospecting activities. The OST uses the MIS as a planning tool to prepare for future activities and to review when conducting annual planning for the next FY. The OST will maintain the Month-in-Sight in MCRISS-OSS. (The Month-in-Sight in MCRISS-OSS automatically updates as an OST schedules events in the Annual Plan or on the Daily Plan.)

(3) OSO/OSA Daily Plan. The OSO/OSA will utilize daily plans to plan for, and record all commitments, scheduled appointments, and other recruiting activities and results that take place for a specific day. Each daily plan has space to record that day's prospecting results, appointments, and interviews conducted. The OST will maintain Daily Plans in MCRISS-OSS.

b. Results Section. This section contains the reports the OST uses to record and track efforts directed at mission accomplishment.

(1) Monthly Prospecting Results. The OST records prospecting (contacts, appointments, and interviews) results on a daily basis. At the end of each week, the totals of each day's prospecting efforts for that week will be totaled and annotated on the monthly prospecting results. At the end of each month, the weekly totals will be totaled to show the monthly cumulative results. This data is used to assist in determining whether or not the OST is conducting enough prospecting to meet assigned objectives, and to assist in analyzing effectiveness. The OST will use Monthly Prospecting data to complete the Monthly Activity Report and Data Analysis Worksheet. OSTs will maintain Monthly Prospecting Results in MCRISS-OSS; this must be accomplished through the regular recording of contacts, appointments, and interviews in MCRISS-OSS. (Refer to Chapter 5 for information regarding the Data Analysis Worksheet)

(2) Interview Log. The Interview Log lists all interviews the OST conducted for the month in chronological order by the day they were conducted. OSTs may use the Interview Log to review previously held interviews and conduct targeted follow-ups as necessary. The OST will maintain the Interview Log in MCRISS-OSS. As new data is entered into MCRISS-OSS on previously conducted interviews, the interview log is automatically updated.

(3) New Working Applicant Sheet. The New Working Applicant Sheet is a list of all NWAs as they are claimed in chronological order by the date the OST started working the applicant; this enables the OST to track its effectiveness at processing NWAs by tracking the status of each NWA (e.g. contracted, DQ, working, etc.) and the "date started working" to contract timeline. The NWA Sheet is different from the NWA Board in that the NWA Board is only used to track NWAs currently working toward contracting while the NWA Sheet is a listing of all of the NWAs (and their status) the OST has worked during a given period of time. The OST will maintain the NWA Sheet in MCRISS-OSS; in MCRISS-OSS, the OST can find the NWA Sheet under "NWA Board" module. The OST will fill in all required information on the NWA Sheet in MCRISS-OSS, recording any changes and/or progression for each NWA. The NWA Sheet in MCRISS-OSS is different than the NWA View tab in MCRISS-OS. The NWA Sheet in MCRISS-OSS tracks the status of every NWA the OST has worked during a given period of time; the NWA View in MCRISS-OS allows the OST to track the progress of working NWAs though processing.

(4) Candidate Record. The Candidate Record lists all candidates in chronological order by the date they were contracted for the current mission year. The OST uses the Candidate Report to record information on all new candidates to track contracting statistics (e.g. contact-to-contract time, source/activity, race, PFT, GPA, etc.); this data is utilized in the annual planning process and throughout the year for OST analysis. The candidate record serves as a running tally of those contracts attained year-to-date by the OST. The OST maintains a physical copy of the Candidate Record in the Management Book. (Appendix L is a copy of the Candidate Record.)

c. Reports Section. This section contains the information used to record prospecting and processing results, as well as the information required to conduct data analysis and set objectives.

(1) Monthly Activity Report. This report provides a format for recording the results of monthly activities and the flow of applicants from contact to contract. The OST uses the Monthly Activity Report for data analysis and to populate the Data Analysis Worksheet. The OST will maintain a physical Monthly Activity Report in the Management Book. Portions of this report automatically update in MCRISS-OSS. Guidance for utilizing the Monthly Activity Report in MCRISS is located in the MCRISS User Manual on the MCRISS homepage. (Appendix J is a copy of the Monthly Activity Report.)

(2) Objectives Sheet. The OSO uses the Objectives Sheet to establish prospecting and interview objectives for the OST. The OSO will analyze data from systematic recruiting component elements such as the Monthly Prospecting Results, the Monthly Activity Report, and the NWA Sheet to set regular objections. The OSO will analyze the OST's data on a monthly basis, at a minimum, to establish objectives to keep the OST on track to achieve its mission by phase line. Refer to Chapter 5 for more information regarding utilization of the Objectives Sheet. (Appendix J is a copy of the Objectives Sheet.)

(3) Prospecting Planning Matrix. The Prospecting Planning Matrix is a planning tool which assists the OST in identifying the number of contacts, interviews, and NWAs the OST needs to accomplish its mission by category and component. The OST will use the Prospecting Planning Matrix during annual planning, and throughout the recruiting year, to assist in setting objectives. The OST will maintain a physical copy of the Prospecting Planning Matrix in the Management Book. Refer to Chapter 5 for more

information regarding utilization of the Prospecting Planning Matrix. (Appendix K is a copy of the Prospecting Planning Matrix.)

d. Mission Letter Section. The RS CO will assign the OSO's mission by issuing a Mission Letter to the OSO. The OSO will maintain a physical copy of the mission letter from the RSCO in the Mission Letter Section of the Management book. The original Mission Letter and subsequent changes will be maintained for the current mission year.

e. Trip Reports Section. The OST uses this section to maintain training reports, trip reports, and Systematic Recruiting Inspection Results for the current mission year. All reports, inspections, and training will be recorded in the Training section of MCRISS-OSS. Guidance for utilizing the Training Module in MCRISS-OSS is located in the MCRISS User Manual on the MCRISS homepage.

f. Pool Section. An OST pool consists of applicants, contracted candidates, partially and fully-trained officer candidates, and commissioned 2ndLt's awaiting TBS. The Pool Section of the Management Book contains the forms used to assist the OSO in the maintenance of the OST's pool. A copy of the OST's current pool report from MCRISS will also be maintained in this section. OSO's will maintain the Pool Section in the physical Management Book. Guidance for utilizing the Pool Report in MCRISS is located in the MCRISS User Manual on the MCRISS homepage.

g. Notes and Reference Section. This section contains miscellaneous notes and references that may assist the OSO in the performance of his/her duties. The section is divided into two sub-sections: (1) Notes and (2) References. Examples of materials an OSO may keep in these sections include Marine Corps height and weight standards, MEPCOM schedule, FROST Calls, blank forms used for screening and processing, etc. OSO's will maintain the Notes and Reference Section in the physical Management Book.

6. Working File. The purpose of the working file is to systematically distribute the OST's workload by action date. Members of the OST "action-date" Prospect Applicant Cards (PACs), College Visit Cards, Pool Cards, and Contact Cards, for the next scheduled contact with the prospect, college, etc. The Working File enables the OST to view the distribution of action-dated cards to ensure the OST is conducting enough business to achieve its mission. When working PACs, College Visit Cards, and Contact Cards in MCRISS-OSS, the OST is able to view the distribution of the aforementioned cards on the OST's Month-in-Sight.

7. Officer Priority Prospect Card (OPPC) Program. An OPPC is the direct result of a request for additional information about the Marine Corps from any of the lead generation sources including Business Reply Cards, 1-800-Marines, Direct Mail and Marines.com. Generally, an OPPC means that a prospect has some interest in the Marine Corps as they have actively sought more information regarding the Marine Corps. The OPPC program drives the initial contact with these high priority prospects forwarded by the national fulfillment center. Aggressive contact is paramount; therefore, the OST must make every effort to contact individuals within 24 hours of receiving the OPPC. OSOs will aggressively work all leads. Chapter 13 provides detailed instruction on the execution the OPPC Program.

8. Officer Selection Assistant Schedule and Results Book (OSA S&R). The OSA S&R Book is a physical binder maintained by the OSA. It will contain the

OSA's daily, weekly, and monthly plans. The OSA will use the S&R to record the OSA's prospecting results for the OST. Each day, the OSA will ensure that the prospecting efforts for that day are totaled and annotated on the daily plan and are combined with the OSO's data by entering the data into MCRISS-OSS. The OST will use this data to complete the OST's Data Analysis Worksheet and set objectives. (Refer to Chapter 5 for more information on data analysis and setting objectives.)

9. Pool Board. The Pool Board reflects the status of contracted, once-trained, and fully-trained candidates for the current mission year. The purpose of the pool board is to provide a snapshot of the status of the OST's pool and display pertinent information regarding each Poolee. The OST will maintain a physical Pool Board in the OST, and the MCRISS-OSS Pool Board will match the physical Pool Board. Guidance for utilizing the MCRISS-OSS Pool Board Module is located in the MCRISS User Manual located on the MCRISS homepage.

10. Programs Book. The Officer Programs Book is a reference for all administrative guidelines pertaining to officer procurement, Marine Corps Orders, FROST calls, administrative instructions, and any other materials which may pertain to processing or contracting an applicant. OSTs will use the Programs Book in MCRISS-OSS and may choose to supplement the information in MCRISS-OSS with an internal OST Program's Book. Guidance for utilizing the MCRISS-OSS Programs Book Module is located in the MCRISS User Manual located on the MCRISS homepage.

11. Prospect Board Module. OSO's utilize the Prospect Board to drive production through the use of action dates on Prospect Applicant Cards (PACs). The Prospect Board Module is a consolidated list of contacts and prospects the OST has met and is working/beginning to work; each contact/prospect has an associated PAC, which contains contact information, screening information, scheduling information for the next contact with the prospect, and notes about the prospect. When a member of the OST schedules an event on the PAC, the event will appear on the OST's daily plan, week-in-sight, and month-in-sight. Guidance for utilizing the MCRISS-OSS Prospect Board Module is located in the MCRISS User Manual on the MCRISS homepage.

12. Training File. The OSO uses the Training File to document both internal training, and the training provided to the OST by higher headquarters. Chapter 3 provides detailed instruction on the OST training and evaluation process and requirements. Guidance for utilizing the MCRISS-OSS Training Module is located in the MCRISS User Manual on the MCRISS homepage.

a. Set-up. The RS RI and the OSO will maintain an individual training and evaluation file on each OSO and OSA in MCRISS-OSS. The OSO will maintain a physical training file on the HRA.

b. Contents. Training and evaluation files will contain, at a minimum:

(1) OSO/OSA Data Sheet

(2) OSOC Evaluation Form (OSOs only); Proficiency and Review Evaluation Form (OSAs from when they were a canvassing recruiter).

(3) A 3/6/9 month OSO Marine On The Job Training (MOJT) checklist; a Recruiter 3/6/9 month Evaluation worksheet for prior canvassing recruiters, and a 1/3/6 Officer Recruiting MOJT Checklist when an OSA is assigned to the OST

directly from the Basic Recruiters Course or still within the nine month evaluation cycle.

(4) OSO 3/6/9 month Evaluation Summary; OSAs will be from when they were a canvassing recruiter

(5) Individual Training Record (ITR). This section contains a record of formal training, evaluations, trip reports, awards, and other training-related documents.

(6) Most recent Systematic Recruiting Inspection (SRI) Checklist (OSOs only). Refer to Appendix A for a copy of the SRI Checklist.

(7) Other documents pertaining to the individual recruiter or HRA, such as trip reports, awards, letters of probation, etc.

13. Profile Progress Data. The Profile Progress Data provides historical data on the performance and progress of the OST. At the end of each recruiting year, the OSO will transfer all physical documents from the Management Book to a Profile Progress Book. The OSO is required to maintain Profile Progress Data for three years (each year documented in its own Profile Progress Book), plus the current recruiting year's data in the Management Book. The Profile Progress Data serves as a source document for profiling historical data on the performance and progress of the OST. Each Profile Progress Book will be divided into the following sections:

a. Plans Section.

(1) Annual Plan.

(2) OSO Daily Plan (maintained in MCRISS-OSS).

b. Results Section.

(1) Monthly Prospecting Results (maintained in MCRISS-OSS).

(2) Interview Logs (maintained in MCRISS-OSS).

(3) New Working Applicant Sheet.

(4) Candidate Record.

c. Reports Section.

(1) Monthly Activity Reports.

(2) Objective Sheets.

(3) Area Canvass Planning Matrices.

d. Mission Letter Section.

(1) Annual Mission Letter.

(2) Mission Updates (as required).

e. Trip Reports Section.

(1) Trip Reports (maintained in MCRISS-OSS).

CHAPTER 3

Officer Selection Team Training and Evaluation

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	3001	3-2
OSO TRAINING AND EVALUATION	3002	3-2
OSA TRAINING AND EVALUATION	3003	3-4
HRA TRAINING AND EVALUATION	3004	3-4
TRAINING REPORTING REQUIREMENTS	3005	3-5

Chapter 3

Officer Selection Team Training and Evaluation

3001. GENERAL. This section establishes the training and evaluation procedures for all OST members. Continuous training on sales skills, systematic recruiting components, and officer program knowledge is essential to mission success. The Recruiting Station Commanding Officer (RSCO) is ultimately responsible for ensuring that OST training is being conducted and documented in a timely manner. The RS Recruiter Instructor (RI), being the RS's primary instructor, is responsible for ensuring that the training and certification of OST members are in keeping with standards set by the Enlisted and Officer Recruiting, Training and Readiness (T&R) Manual. Guidance for utilizing the MCRISS-OSS Training Module is located in the MCRISS User Manual on the MCRISS homepage.

3002. OSO TRAINING AND EVALUATION.

1. OSO Training Process. [Figure 3-1](#) is the established order of training for new OSOs; however, rotation dates and Officer Selection Officer Course (OSOC) dates will dictate the actual order of training.

	RS	District	Region	MCRC
OSOC				X
Proficiency and Review	X			
3 Month MOJT	X			
3 Month Evaluation/Summary		X		
6 Month MOJT	X			
6 Month Evaluation/Summary		X		
9 Month MOJT	X			
9 Month Evaluation/Summary		X		
Refresher and Reinforcement	X			
Training and Assistance	X	X	X	X
Conferences	X	X	X	X
SRIIs	X	X	X	X

[Figure 3-1](#) - OSO Training Process

a. Proficiency and Review Training (PAR) for OSOs. Once the OSO checks in to the command, the RSCO will ensure that the following training, at a minimum, is conducted within the first 30 days of check-in:

(1) RS Orientation (policies, procedures, organizational structure, and roles of the command group, to include MCD AOP staff)

(2) Introduction to Systematic Recruiting and MCRISS-OSS

(3) Introduction to Marine Corps Communication and Consulting (MC3)

b. Officer Selection Officer Course (OSOC). OSOC provides formal school training to Officers assigned to officer selection duty. The course is designed to be an introduction to officer recruiting and will be followed up with training from the RS and the District during the 3/6/9 month MOJT and Evaluations. OSOs will attend the first available course upon assignment to OSO duty. OSOC will be coordinated and conducted by MCRC. The MCRC National Training Team (NTT) teaches the fundamentals of officer recruiting in general

subjects such as: Marine Corps Communication and Consulting Skills (MC3), Marine Corps Presentation Skills, prospecting and college relations, screening, contact-to-contract chain, medical, introduction to systematic components, data analysis and setting objectives, annual planning, pool management, officer programs, etc. A record of all evaluations conducted at OSOC will be uploaded to each OSO's training record in MCRISS-OSS.

c. 3/6/9 Month MOJT Checklists and Evaluations. When the OSO completes OSOC, the RS and MCD AOP will complete a series of training and evaluations at the OSO's three, six, and nine month marks. The RS will be responsible for completing the three, six, and nine month MOJT checklists. The MCD AOP is responsible for completing the three, six and nine month evaluation summary and final certification of the OSO. The RS RI/ARI will be available for the OSO evaluations and summaries. All checklists and evaluations will be maintained in the training file in MCRISS-OSS. Appendix B provides a copy of the OSO MOJT Checklist and Evaluation Summary.

d. Refresher and Reinforcement (R&R) Training. The RS will conduct 12 hours per quarter of R&R training for all recruiters to include the OSO and OSA. This training is designed to sustain and improve the knowledge and skill level of the recruiting force. Training will consist of classroom review and include practical application of specific officer recruiting subjects.

e. Training and Assistance (T&A) Visits. T&A visits are intended to ensure the OST is making satisfactory progress toward attaining its assigned mission. During the visit, if areas are identified where improvement can be made, the training will be documented on a trip report with the corrective actions the OSO needs to implement. The RS CO will be briefed upon completion of the visit for any visits higher headquarters conducts. All trip reports will be maintained in MCRISS-OSS in the training file.

f. MCD and National Training Events. Each MCD will hold, at a minimum, one OST specific training event per year. Additionally, there is one National OSO Training Event per year. These training events are designed to review sales skills, systematic recruiting, processing, share OST specific tactics/techniques/procedures (TTPs), mission trends, and promote camaraderie.

g. Systematic Recruiting Inspections (SRIs). SRIs are formal inspections conducted by the RS, MCD, or Region. During the turnover process between the outgoing and incoming OSO, an SRI will be conducted and the District will conduct a pool validation of the OST's pool. The pool validation will confirm the status of all applicants and candidates in the pool. The SRI will act as a report card for the outgoing OSO and as a starting point for the incoming OSO. If there is a gap between OSOs, the RS will conduct an SRI no more than 60 days prior to the OSO's departure, and another SRI will be conducted within 30 days of the incoming OSO's arrival. Once the inspection is completed, a copy of the inspection checklist will be maintained in the training file in MCRISS-OSS. Thereafter, follow-on SRIs will be conducted annually. Appendix A is a copy of the SRI Checklist.

h. Internal Training. OSOs are responsible for conducting internal team training for a minimum of twelve hours per quarter. The OSO will determine the training plan based on the OST's strengths and weaknesses. Internal training must be documented in the MCRISS-OSS training file for OSOs and OSAs, and in hard-copy training folders for HRAs.

3003. OSA Training and Evaluation.

1. OSA Training Process. [Figure 3-2](#) is the order of training for the OSA. If the OSO is still within the 9 month evaluation cycle, the RS is responsible for the 1/3/6/9 MOJT.

	OSO	RS	District	Region	MCRC
OSAC					X
1 Month MOJT	X				
1 Month Evaluation/Summary		X			
3 Month MOJT	X				
3 Month Evaluation/Summary		X			
6 Month MOJT	X				
6 Month Evaluation/Summary		X			
9 Month MOJT	X				
9 Month Evaluation/Summary		X			
R&R		X			
T&A		X	X	X	X
Conferences		X	X		X

[Figure 3-2](#) - OSA Training Process

a. Officer Selection Assistant Course (OSAC). OSAs are required to attend OSAC training provided by the MCRC NTT. This course is designed to be an introduction to officer recruiting while identifying the similarities and differences between officer and enlisted recruiting. The course provides an introduction to OSS member functions, officer programs and the mission, an OCS orientation, and identifies key differences in the contact-to-contract chain an OSA must be aware of to be successful.

b. 1/3/6/9 MOJT Checklists. To ensure OSAs understand the officer procurement process and are qualified and productive members of the OST, a formal evaluation process will take place. The OSO is responsible for completing the MOJT checklists at the one, three, six, and nine month mark. These evaluations will be maintained in the OSAs training file in MCRIS-OSS. If the OSO is still within the 9 month evaluation cycle, the RS RI/ARI will be responsible for the 1/3/6/9 MOJT. Appendix C provides a copy of the OSA MOJT Checklist and Evaluation Summary.

c. 1/3/6/9 Evaluations. The RS is responsible for completing the OSA evaluations at the one, three, six, and nine month mark. These evaluations will be maintained in the training file in MCRIS-OSS.

d. Refresher and Reinforcement (R&R) Training. The RS will conduct 12 hours per quarter of R&R training for all recruiters to include OSAs. This training is designed to sustain and improve the knowledge and skill level of the recruiting force. Training consists of classroom review of specific recruiting subjects and will include specific officer recruiting subjects.

3004. Human Resource Assistant Training and Evaluation. The Human Resource Assistant (HRA) provides continuity within the OST. The HRA needs to be incorporated into every facet of the OSTs internal training plan. HRAs will receive, and can assist in providing, training and assistance to the OST in a variety of officer recruiting related subjects.

1. Training File. The OSO will maintain a hard-copy training file for the HRA and document all training conducted.

2. Performance Reviews. HRAs will receive a minimum of three counseling's/performance reviews annually. The purposes of these reviews are to promote core competency and correct deficiencies where applicable. The initial counseling will cover the HRA's position description and expectations of performance (this counseling occurs when a new OSO checks in, and will be repeated at the beginning of every fiscal year). The first required performance review, taking place in March, will cover job performance since the initial review. The second required review is the annual review; the annual review will be completed by September 30th and will cover the HRA's performance throughout the entire fiscal year.

3005. Training Reporting Requirements. Each level of the chain of command will report OST training requirements to their higher headquarters on a monthly basis for tracking purposes.

CHAPTER 4

Product Knowledge

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	4001	4-2
COMMISSIONING SOURCES PROCESSED THROUGH THE OST	4002	4-2
SUPPLEMENTARY PROGRAMS	4003	4-4
MARINE CORPS OFFICER OPPORTUNITIES BOOK	4004	4-4
OTHER COMMISSIONING SOURCES	4005	4-5
A NOTE ON PROFESSIONALIMS WITH RESPECT TO PRODUCT KNOWLEDGE	4006	4-5

Chapter 4

Product Knowledge

4001. GENERAL. Product knowledge is a thorough understanding of not only the commissioning programs offered by the Marine Corps, but also opportunities available to Marine officers throughout their careers. Accordingly, OST members must be able to locate this information to answer questions a prospect or applicant may ask. An OST that lacks product knowledge will appear unprofessional and inexperienced; this will likely have a negative impact on mission accomplishment.

4002. COMMISSIONING SOURCES PROCESSED THROUGH THE OST. The officer programs are at the heart of product knowledge. Each member of the OST must possess a thorough understanding of the requirements for each program, the benefits associated with each program, and the associated timelines for training, commissioning, etc. for each program. Officer Selection Teams work with applicants for the following programs:

1. Platoon Leaders Class (PLC). The PLC program is the commissioning program for full-time enrolled undergraduate freshman-juniors and law students. Undergraduate freshman-juniors may apply for either the Ground, Student Naval Aviator (SNA), or Student Naval Flight Officer (SNFO) programs. Freshman and sophomores attend (two) six-week training sessions at Officer Candidate's School (OCS); they attend PLC Juniors during the summer after selection, and PLC Seniors during the summer prior to graduation and commissioning. College juniors attend (one) ten-week training session (PLC Combined) during the summer after selection.

a. Ground. The Ground component contract is an eight-year [four active duty and four Individual Ready Reserve (IRR)] contract encompassing all officer Military Occupational Specialties (MOS) except Naval Aviator, Naval Flight Officer, and Judge Advocate. Second Lieutenants are assigned MOSs within the ground component at TBS based on the needs of the Marine Corps and the officer's preference. Refer to NAVMC 10460, Service Agreement, PLC Ground, for additional details on the PLC Ground program.

b. Student Naval Aviator (SNA). SNAs will attend flight school immediately following TBS. Aviation platforms are assigned at flight school based on the needs of the Marine Corps, performance, and the officer's preference. Refer to NAVMC 10461, Service Agreement, PLC Naval Aviator, for details regarding contract-length commitment and the policy concerning flight school attrition.

c. Student Naval Flight Officer (SNFO). SNFOs will attend flight school immediately following TBS. Refer to NAVMC 11440, Service Agreement, PLC Student Naval Flight Officer, for details regarding contract-length commitment and the policy concerning flight school attrition.

d. Law. The PLC Law program is the commissioning program for individuals accepted to law school or enrolled in their first or second year of school. Selected candidates attend (one) ten-week training session at OCS. Candidates commission as second lieutenants immediately following OCS and return to law school as officers in the Individual Ready Reserves (IRR). Second Lieutenants in the PLC Law program are eligible for promotions, summer internships, and pre- and post-Bar internships. Refer to NAVMC 10698, Service Agreement, PLC Law, for additional details regarding contract-length, promotions, and the

policy concerning Lieutenants who do not pass the Bar. The MCRC Deputy Staff Judge Advocate is the PLC Law Program Pool Coordinator and may serve as an additional resource for any questions regarding the PLC Law program.

2. Officer Candidates Class (OCC). The OCC program is the commissioning program for graduates of regionally or nationally accredited colleges or universities, and seniors enrolled in their final semester of college. Selected candidates attend (one) ten-week training session at OCS. Candidate's commission and report to TBS immediately following OCS.

a. Ground. The Ground component contract is an eight-year [four active duty and four Individual Ready Reserve (IRR)] contract encompassing all officer Military Occupational Specialties (MOSs) except Naval Aviator, Naval Flight Officer, and Judge Advocate. Second Lieutenants are assigned MOS' within the ground component at TBS based on the needs of the Marine Corps and the officer's preference. Refer to NAVMC 10462, Service Agreement, OCC Ground, for additional details on the OCC Ground program.

b. Reserve Ground (OCC-R). The Reserve component contract is an eight-year contract [four with a Selected Marine Corps Reserve Unit and four with the Individual Ready Reserve (IRR)]. The contract encompasses all officer MOSs except Naval Aviator, Naval Flight Officer, and Judge Advocate. Applicants choose a between a preference of geographic location or MOS preference. Neither MOS, nor geographic preference, are guaranteed, but an applicant may choose to travel to a unit outside of their local geographic location if the closest unit does not have the desired MOS. If an individual decides to travel outside their local AO, the individual will be eligible for reimbursement of travel expenses up to \$300. Refer to NAVMC 11534, Service Agreement, OCC Reserve Ground, for additional details. The Reserve Officer Commissioning Program (ROCP) Manager assigned to Manpower and Reserve Affairs (M&RA) may serve as an additional resource for any questions regarding the OCC Ground/Reserve Program.

c. Student Naval Aviator (SNA). SNAs will attend flight school immediately following TBS. Aviation platforms are assigned at flight school based on the needs of the Marine Corps, performance, and the officer's preference. Refer to NAVMC 10463, Service Agreement, OCC Student Naval Aviator, for details regarding contract-length commitment and the policy concerning flight school attrition.

d. Student Naval Flight Officer (SNFO). SNFOs will attend flight school immediate following TBS. Refer to NAVMC 11433, Service Agreement, OCC Student Naval Flight Officer, for details regarding contract-length commitment and the policy concerning flight school attrition.

e. Law. OCC Law Program Officers report to Naval Justice School immediately following TBS. Refer to NAVMC 10952, Service Agreement, OCC Law, for additional details regarding contract-length and promotions. The MCRC Deputy Staff Judge Advocate may serve as an additional resource for any questions regarding the Law program.

3. The primary reference for all commissioning sources is MCRCO 1100.2_ Officer Commissioning Manual (OCM). In addition to the OCM, each OST possesses a Programs Book, located in MCRISS-OSS, which contains the latest information and updates to programs and orders. All OSS personnel will adhere to the policies in these manuals, as they provide the regulations pertaining to the officer procurement process.

4003. SUPPLEMENTARY PROGRAMS.

1. Marine Corps Tuition Assistance Program (MCTAP). The MCTAP provides once-trained and fully-trained candidates (and PLC Law Lieutenants) up to \$5200.00 per academic year for reimbursement of tuition-related expenses. Provided candidates meet all other eligibility requirements, candidates may apply for MCTAP after completion of PLC Juniors or PLC Combined. If a candidate decides to take advantage of the MCTAP, the candidate may receive up to \$5200 in a lump sum payment for reimbursable expenses. If a candidate does not maximize the \$5200 of reimbursable expenses in the initial application during the fall semester, the candidate may apply for the remainder of the \$5200 during the following winter semester. Marine Corps Order (MCO) 1560.33 provides amplifying guidance on the MCTAP.

2. Financial Assistance Program (FAP). The FAP provides once-trained and fully-trained candidates (and PLC Law Lieutenants) up to \$3150.00 per academic year for a subsistence allowance payment. Provided candidates meet all other eligibility requirements, candidates may apply for FAP after completion of PLC Juniors or PLC Combined. If a candidate decides to take advantage of the FAP, the candidate will apply each semester and will receive a single payment of \$1575 per semester. Marine Corps Recruiting Command Order (MCRCO) 7220.1 provides amplifying guidance on the FAP.

3. Notice of Eligibility (NOE) Benefits for Members of the Marine Corps Reserve (MCO 1770.2). MCO 1770.2_ is a reference which provides specifics on the benefits available to Marine Reservists. Specific questions regarding benefits available to Marine Reservists may be directed to the Reserve Officer Commissioning Program (ROCP) Manager with Manpower and Reserve Affairs (M&RA).

4004. MARINE CORPS OFFICER OPPORTUNITIES BOOK (MCOOB). The MCOOB is a proof source that provides information about commissioning programs, MOSs, and opportunities available to Marine Officers. When utilized effectively, the MCOOB is a valuable resource to the OST; it is strongly recommended that OSOs integrate the MCOOB into every interview. It is also recommended that OSOs incorporate professional and personal information in the MCOOB to aid in aligning with applicants' needs. Some recommended information for OSOs to add to their MCOOB include:

1. The Basic School
2. MOS Selection (MCO 1200.17_, MOS Manual)
3. Pay and benefits
4. Officer Promotions (MCO P1400.31_, Marine Corps Promotion Manual Volume I, Officer Promotions)
5. Career Progression
6. Career Designation (MCO 1001.65_, Officer Retention and Prior Service Accessions)
7. Marine Corps Installations
8. Second Tour Opportunities

9. Professional Military Education (PME) (MCO 1553.4_, Professional Military Education)
10. Special Education Program (SEP) (MCO 1520.9_, Special Education Program)
11. Off-duty Education (G.I. Bill, Tuition Assistance)
12. Military College Loan Deferment

4005. OTHER COMMISSIONING SOURCES. OST members must be familiar with other commissioning programs available, both within the Marine Corps and other services. Knowledge of other opportunities available to potential applicants will assist the OST in determining the most appropriate commissioning route for applicants. Refer to service specific commissioning manuals for additional details on other service programs. Other Marine Officer commissioning programs include:

1. Naval Reserve Officer Training Corps (NROTC) Scholarship Program [MCO 1306.17_, Administration of Marines Appointed Midshipmen or Cadets in Federal Service Academies or Naval Reserve Officers Training Corps (NROTC) Units]
2. Marine Corps Enlisted Commissioning Education Program (MECEP) [MCO 1560.15_, Marine Corps Enlisted Commissioning Education Program (MECEP)]
3. Enlisted Commissioning Program (ECP) (MCO 1040.43_, Enlisted-to-Officer Commissioning Programs)
4. United States Naval Academy (MCO 1530.11_, Application for Nomination to the U.S. Naval Academy and Naval Academy Preparatory School)
5. Selected Marine Corps Reserve Direct Commissioning Program (DCP) [MCO 1040R.10L W/CH1, Selected Marine Corps Reserve Enlisted Commissioning Program (RECP)]
6. Meritorious Commissioning Program Reserve (MCP-R) (MCO 1040.43_, Enlisted-to-Officer Commissioning Programs; MARADMIN 415/11 Major Changes to the Enlisted to Officer Commissioning Programs)

4005. A NOTE ON PROFESSIONALISM WITH RESPECT TO PRODUCT KNOWLEDGE. OST members must be able to discuss the issues that are important to applicants and know where to find accurate information. Product knowledge instills confidence in the OSO, reassures the applicant, minimizes objection and disinterest, and is the cornerstone of the professionalism that is expected of a Marine Corps representative. To assist applicants gain a clear understanding of their options, OST members will be familiar with the following:

- a. Waiver procedures established in MCRCO 1100.2_, Officer Commissioning Manual (OCM).
- b. Medical processing procedures of MEPS/BUMED/DoDMERB/NAMI
- c. Board selection process and timelines.
- d. Enlistment Options (MCRISS-RSS Programs Book).

CHAPTER 5

How to Collect Data, Analyze Data, and Set Objectives

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
DATA COLLECTION	5001	5-2
TERMINOLOGY	5002	5-2
RECORDING ACTIVITIES AND RESULTS	5003	5-5
DATA ANALYSIS	5004	5-6
DETERMINING YOUR OBJECTIVES	5005	5-7

Chapter 5

How to Collect Data, Analyze Data, and Set Objectives

5001. DATA COLLECTION. It is imperative the OST collect consistent and accurate data that can be utilized to analyze the efficiency of the recruiting process. Consistent and accurate data collection will enable the OST, through analysis, to gain a better understanding of the OST's strengths and weaknesses, the effectiveness of the systematic recruiting process, and the effectiveness of recruiting activities.

1. The benefits of collecting data include the following:

a. Data shows how effective an OST is at various recruiting activities (prospecting, screening, interviewing, and processing). This will assist in determining where training is needed.

b. Data assists in determining objectives and identifying whether or not the OST is conducting the required prospecting necessary to meet established objectives.

c. Data identifies specific strengths and weaknesses in each of the recruiting activities. Understanding the OST's effectiveness in each of the recruiting activities will enable the OST to focus its efforts in the most efficient and effective activities.

2. The Marine Corps Recruiting Information Support System (MCRISS-OSS) is the program MCRC uses to assist the OST in data collection, data analysis, and setting objectives. With the exception of the Production Reports listed below, the below webpages are all located in the MCRISS-OSS Schedule Module and will assist the OST in data collection, data analysis, and setting objectives:

- a. OSO Daily Plan / Week-in-Sight / Month-in-Sight
- b. Daily / Weekly / Monthly Prospecting Results
- c. Monthly Activity Report
- d. Prospecting Planning Matrix
- e. Data Analysis Worksheet
- f. Objectives Sheet
- g. Production Reports (PLC, OCC, and Diversity)

5002. TERMINOLOGY. To allow for proper data analysis, the OST must understand a standard set of terms and definitions MCRC utilizes for data collection. The key to data collection and analysis is consistency. If there are any questions regarding the definitions below, contact the RS RI or MCD AOP Shop for clarification; the key to data analysis is consistent data collection to allow for effective analysis. MCRC uses the following terms and definitions for data collection:

1. Source (SRC). The source is the agency or program that produced the lead. In other words, where did the contact come from? The sources are listed below:

- Display Table (DST)
- Area Canvass (CAN)
- Career Fair (CFR)
- Campus Presentation (CMP)
- Local Postal Mail-out from OSS (LPM)
- Local Electronic Mail-out from OSS (LEM)
- Enlisted Recruiting Referral (ERR)
- OSS Pool Referral (DEP)
- Referral (REF)
- Marine Corps Reserve (MCR)
- Marine Corps Flight Orientation Program (FOP)
- Officer Priority Prospect Card (OPPC)
- Walk-in (WKI)
- Call-in (CAL)
- Local Advertising (LAD)
- Other (OTH)

2. Activity. The Activity is the prospecting activity used to make the "Initial Contact" with an individual. There are four activities used in systematic recruiting: Telephone Call (TC), Digital Communication (DC), Area Canvass (AC), and Office Traffic (OT). Subsequent contacts with prospects are not counted as prospecting activities unless 12 months or more have passed since the last contact date.

a. Telephone Call (TC). An OST records a contact with a TC activity when the OST initiates a call with a prospect from a list, with the intent to schedule an appointment to discuss commissioning programs. A telephone contact is only counted the first time a prospect is contacted, and is counted regardless of whether or not the contact results in an appointment. All subsequent contacts are follow-ups.

Example: An OSO utilizes a university school list to call a prospect via the phone. The OSO screens the prospect over the phone, but the prospect has a disqualifying medical condition. The contact will be entered in MCRISS-OSS as a contact, but will be recorded with a status/action of Temporarily or Permanently Disqualified (TDQ or PDQ). Recording this data will assist the OST in analyzing its effectiveness. This prospect would be recorded with Activity as "TC" and the Source as "CAL."

b. Digital Communication (DC). Digital Communication (DC) as a prospecting activity is defined as the act of contacting a prospect via any social media or electronic medium platform with the intent to schedule an appointment. This includes all social media or electronic medium such as Facebook, e-mail, texting, OPPCs, etc. Contact with a prospect via social media and electronic medium is only counted the first time an OSO makes contact with the prospect.

Example: An OSO utilizes a university school list to mass email 5,000 students through the email generator on the Advertising Portal. If five prospects email the OSO back, those five prospects are recorded in MCRISS-OSS as contacts with the appropriate status/action, the Activity as "DC," and the Source as "LEM."

c. Area Canvass (AC). Area Canvassing (AC) is meeting likely prospects face-to-face, and obtaining their names and sufficient contact information for the purpose of gaining an appointment. For a prospect to count as an AC contact, the OST must have sufficient information to conduct a follow-up; always attempt to get a name, phone number, and e-mail address. Once contact is made, the OSO will document the individual's contact information in MCRISS-OSS.

Example: An OSO attends a career fair on campus. After speaking with a prospect at the career fair about the officer programs, the OSO attains the prospect's contact information. Upon returning the OSS, the OSO enters the prospect's information in MCRISS-OSS with the appropriate status/action, the Activity as "AC," and the Source as "CFR."

d. Office Traffic (OT). Office Traffic (OT) as a prospecting activity is defined as those individuals, who walk in, call in, contact an OST through social media or an electronic medium, or are brought by others to an OSO's office to discuss officer programs for the first time.

Example: An OSO leaves pamphlets and business cards at a "Take One" stand at the university recreation center. A prospect comes across the pamphlets and contacts the OSO via email. The OSO will establish contact with the applicant, and enter the prospect's information in MCRISS-OSS with the appropriate status/action, the Activity as "OT," and the Source as "LAD."

3. Contact. A contact is an individual a member of the OST has never communicated with previously, is not obviously disqualified, and from whom the member of the OST obtains sufficient information to conduct a follow up.

4. Appointment. The criterion for an appointment is met when the prospect agrees to meet with the OSO, at a specific time and date to discuss commissioning programs. This criterion meets the definition for an appointment whether the prospect shows for the appointment or not.

5. Interview. A face-to-face meeting with an individual, who has been screened, found to be basically qualified, and is given a full sales presentation using benefit tags (basically qualified is defined as an applicant who has a more than reasonable chance of contracting during the current FY). Whether or not the prospect says, "yes" to a commissioning program, does not matter; if the prospect is basically qualified, and a sales presentation is conducted, it is counted as an interview.

6. New Working Applicant (NWA). An NWA is defined as an individual who meets the minimum requirements for mental, moral, medical and physical screening, has been given a sales presentation, and is scheduled to move forward with the next step(s) toward becoming an officer (screened, sold, and scheduled). NWAs are declared and documented in MCRISS-OSS/OS prior to processing and contracting. Having a qualified mental score or physical qualification is not necessary to declare an NWA. An individual counts as an NWA only one time during a 12-month period, and will be counted as an NWA a second time only if more than 12 months have passed since the last declaration. If 12 or more months have lapsed since the NWA was previously declared, and the NWA is beginning an application for a new selection board, the NWA will need to be reentered into MCRISS-OSS as a lead/PAC/appointment/interview and re-declared as an NWA in order for the NWA to count toward the current mission year. Examples of NWAs include:

a. Following the sales presentation, the OSO gives the applicant a rough application and schedules a follow up for the applicant to bring the application back. At this point, the applicant is documented as a NWA in MCRISS-OSS/OS.

b. An applicant is given a sales presentation and states that he/she wants to move forward with the process; however, the applicant will require a MCRC exception to policy waiver for a tattoo, and a Region-level age waiver. The OSO gives the applicant a rough application and schedules a follow up for the applicant to bring the application back. At this point, the applicant is documented as an NWA in MCRISS-OSS/OS.

c. Following the sales presentation, the OSO re-screens the applicant's medical history and schedules an appointment at the nearest Military Entrance Processing Station (MEPS) or DODMERB facility for a physical. At this point, the applicant is documented as a NWA in MCRISS-OSS/OS.

d. Other - An individual who is committed to moving forward with the next steps necessary for contracting. Examples include Scheduling Physical Fitness Tests (PFT) in cases where applicants are already medically qualified, attendance at OSS Physical Training (PT) and OSS Pool Events, etc. Once an applicant commits to moving forward with the next step toward applying for the officer programs, the applicant is documented as a NWA in MCRISS-OSS/OS.

7. Contract. An individual is qualified (based on the requirements for contracting in accordance with the OCM), has signed all required documents, and has been given the oath of enlistment by the OSO. [To apply for the PLC or OCC program, civilian applicants must sign a DD4, Enlistment/Reenlistment Document, enlisting in the Individual Ready Reserves (IRR).]

5003. RECORDING ACTIVITIES AND RESULTS. Both the OSO's and OSA's plan and activities are documented as a single OST plan in MCRISS-OSS. Activity results are recorded in MCRISS-OSS on the OST Daily Plan, Monthly Prospecting Results, and Monthly Activity Report. If data is entered in MCRISS-OSS correctly and consistently, these documents contain the elements necessary for data analysis and setting objectives. Additionally, these sheets are utilized for recording activities and their results, on a daily, weekly, and monthly basis. Detailed instructions for completing these documents in MCRISS-OSS may be found in the MCRISS User Manual located on the MCRISS homepage.

1. The following are key elements for data analysis and setting objectives:

a. Activities (TC, DC, AC, OT)

b. Results (Number of Appointments, Interviews, NWAs, Contracts by Activity)

2. Once a contact's information is entered in the Prospect Board Module in MCRISS-OSS, OST's will utilize the prospect's Prospect Applicant Card (PAC) to schedule appointments, mark appointments completed as interviews, and schedule follow ups. The Schedule Module in MCRISS-OSS will record the number of TC, DC, AC, and OT contacts, appointments and interviews scheduled/conducted on a given day. To keep data accurate and reliable, it is imperative that OSTs record activities and results in a timely manner.

3. MCRISS-OSS will automatically tabulate monthly prospecting results in the Schedule Module by adding each day/week's contacts, appointments, and interviews on the Monthly Prospecting Results tab. Additionally, these totals are automatically transferred to the Monthly Activity Report located in the Schedule Module in OSS View. By comparing these numbers with the objectives established at the beginning of the month, the OST will be able to determine if it met its monthly prospecting objectives.

4. Once the OST has completed all data entry/marketing events complete in MCRISS-OSS, the Monthly Activity Report will be the sole document used to complete the Data Analysis Worksheet.

5004. DATA ANALYSIS. Analysis is a valuable tool in evaluating the OST's effectiveness; not only does it enable the OST to focus its prospecting efforts, but it also enables the OST to determine its weaknesses for scheduling training. Data is recorded for the OST over a 12-month period; the recruiting year begins on 1 July and ends on 30 June. Data is continually updated and is not affected by personnel changes. Data analysis examines the OST's prospecting, screening, selling, and processing during a given period of time. Based on the time it takes for an applicant to progress through the officer procurement process, an OST will seek to utilize 12-months of data analysis to set objectives (a minimum of three months, or MCRC averages will be used in the event the last 12-months of data is unavailable).

1. The Data Analysis Worksheet is the tool the OST uses to compile data on a monthly basis for analysis. (Appendix I is the Data Analysis Worksheet) The OST will utilize the Data Analysis Worksheet to determine the following:

a. Standard of Effectiveness (SOE). A SOE is calculated for each recruiting activity (AC, TC, DC, OT). It is calculated by dividing the total number of a contacts for each individual recruiting activity an OST has attained by the number of interviews generated from that particular activity. When figuring out SOEs, always round up to the next or higher whole number, (e.g., 3.6 = 4 or 5.4 = 6).

Example 1: If an OST attains 60 AC contacts in the month, and 6 interviews from AC contacts, the SOE would be 10, or 10:1. (In this example, it takes 10 AC contacts to obtain 1 interview).

Example 2: If an OST makes 150 phone-calls, records 5 as contacts, and obtains 1 interview from TC contacts, the SOE would be 5, or 5:1. (In this example, it takes 5 TC contacts to obtain 1 interview. The OST does not count the number of phone-calls attempted; it counts the number of contacts attained.)

b. Business Percentage (BP). The BP shows the relative weight, or value, of each of prospecting activity; where is the OST's business coming from? AC, TC, DC, OT? The BP is the percentage of total interviews an OST held as a result of one of the four prospecting activities.

For example: If an OST conducts 16 total interviews during the month, and 4 of these interviews were obtained from TCs, then, the BP for TCs would be 25%.

c. Closing Ratio (CR). The CR is the number of interviews it takes the OST to obtain one New Working Applicant. The CR is calculated by dividing the number of interviews an OST has conducted by the number of NWA's it generated.

Always round up to the next, or higher 1/10th, (e.g., 3.33 = 3.4). The CR demonstrates the OST's effectiveness at conducting sales presentations.

For example: If an OST conducts 16 interviews, from which it declared 5 NWAs, the CR would be 3.2:1. (In this example, it takes the OST 3.2 interviews to declare 1 NWA).

d. Processing Ratio (PR). The PR is the number of NWA's it takes the OST to contract one applicant. The PR is calculated by dividing the total number of NWA's an OST has declared by the number of contracts the OST has generated. Always round up to the next, or higher 1/10th, (e.g., 3.33 = 3.4). The PR demonstrates the OST's effectiveness in the screening process and the skills necessary to gain, and maintain, commitment.

For example: If the OST declared 12 NWAs but only contracted 9 of the applicants; the PR would be 1.3:1. (In this example, it takes the OST 1.3 NWAs to contract 1 applicant).

e. Sales Ratio (SR). The SR is the number of interviews it takes the OST to obtain one contract. The SR is calculated by dividing the number of interviews an OST has conducted by the number of contracts it generated. Always round up to the next or higher 1/10th, (e.g., 4.73 = 4.8 or 4.79 = 4.8). The SR gauges the effectiveness of processing by examining both the effectiveness of the sales process, and the effectiveness of the OSTs screening of potential applicants.

For example: If an OST conducted 14 interviews and obtained 3 contracts, the SR would be 4.7:1. (In this example, it takes the OST 4.7 interviews to obtain 1 contract).

2. If an OST accurately and consistently records contacts, appointments, interviews, and declares NWAs and contracts in MCRISS-OSS, the support system will calculate the above ratios and percentages for the OST on the Monthly Activity Report. In the event the Data Analysis Worksheet in MCRISS-OSS is inoperable, OSTs may have to use the data from the Monthly Activity Reports to complete Appendix I (Data Analysis Worksheet) to capture the last 12-months of data.

5005. DETERMINING OBJECTIVES. OSTs will utilize the last 12-months of data to determine monthly objectives. In the event the Objectives Sheet in MCRISS-OSS is inoperable, OSTs may have to use the data from the Data Analysis Worksheet to complete Appendix J (Objectives Sheet) to identify objectives.

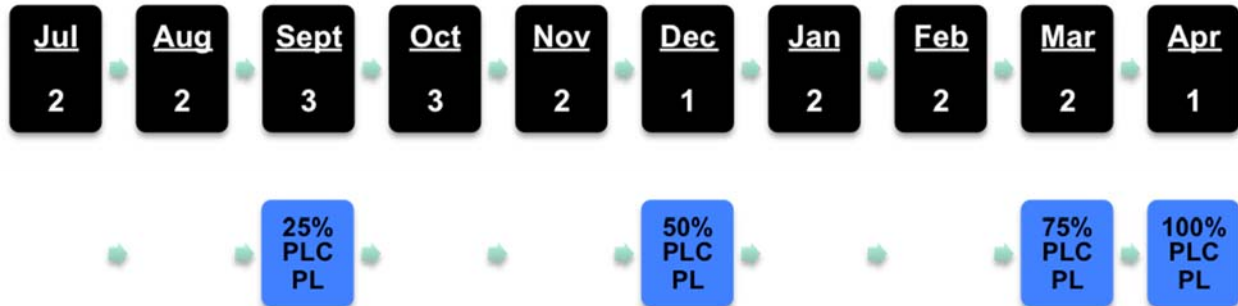
1. Objectives are set for the following:

- a. Contracting Objective
- b. Interview Objective (IO)
- c. New Working Applicant Objective (NWA Objective)
- d. Activity Objectives (TC, DC, AC, and OT)

2. Contracting Objective. The monthly contracting objective will change throughout the recruiting year. The key to establishing the contracting objective is back planning. Once an OSO has received their mission, they will need to consider several factors when determining contracting objectives.

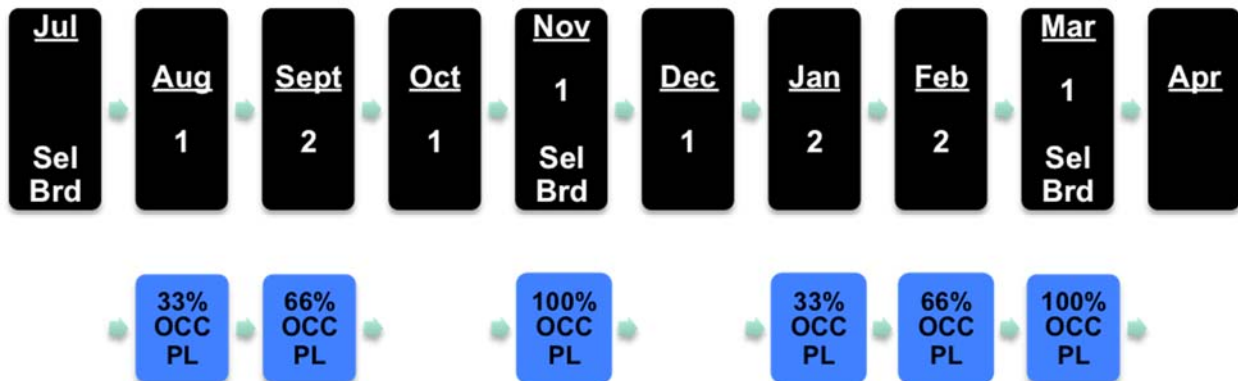
Factors to consider include: the timing of the selection boards, phase lines, and university schedules. See Figure 5-1 Monthly Contracting Objectives for an example of how to determine objectives.

Potential PLC Contracting Objectives



In the figure above, the RSCO assigned the OSO with a mission of 20 total PLC contracts. Contracting for the upcoming FY mission begins in July, and in this example, the 100% PLC Phase Line (PL) is in April. August-October is typically the OST's busiest time on campus (resulting in the most success), while business is typically slower around Thanksgiving, finals in December, and winter break in December/January.

Potential OCC Contracting Objectives



In the figure above, the RSCO assigned the OSO with a mission of 12 OCC contracts for the Fall and Winter selection boards (This does NOT include the Summer selection Board in July; the warning order for the summer OCC selection board will be distributed during the winter OCC class. To plan for the summer OCC selection board, an OST will need to plan a contracting mission for April, May, and June.)

Total PLC and OCC Monthly Contracting Objectives

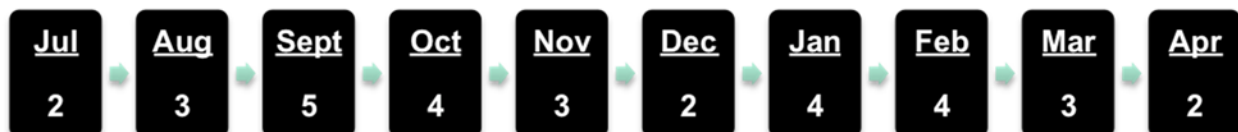


Figure 5-1 - Monthly Contracting Objectives

a. OSOs establish the monthly contracting objective while developing the OST's annual plan. If an OST misses its contracting objective for the month, that contract must be made up during a later month; it is up to the OSO to establish and adjust the OST's objectives as necessary. Additionally, OSOs must be careful not to reduce the contracting mission if the OST over-contracts applicants in categories where it has already achieved its mission. For example, if an OST has achieved its entire PLC Ground mission by the end of November (and is still lacking in PLC Air and PLC Law), but then contracts two additional PLC ground contracts in December, the OST has not contributed any necessary contracts toward the achievement of its mission during December; despite the PLC Ground contracts, the OST is still lacking in two key components of its mission.

b. The monthly contracting objective, in conjunction with the data compiled on the Data Analysis Worksheet, is utilized to establish the monthly interview and NWA objectives.

3. Interview Objective (IO). Based on the data analysis and the contracting objective, this is the number of interviews the OST needs to conduct to meet the monthly contracting objective. Since the SR is defined as the number of interviews it takes to write one contract, the IO is determined by multiplying the SR by the Contracting Objective.

For example:

$$\frac{4.7}{SR} \times \frac{4}{Contr\ Obj} = \underline{18.8} \text{ (19 Interviews for the mos/5 per week)}$$

4. New Working Applicant Objective (NWA Objective). Based on the data analysis, the NWA Objective is the number of NWAs the OST needs to declare to write the number of contracts assigned for the upcoming month. Since the IO projects the number of interviews required to meet the assigned contract mission, and the CR is defined as the number of interviews required to produce one NWA, the monthly NWA Objective can be determined by dividing the monthly IO by the CR.

For example:

$$\frac{19}{IO} \div \frac{3.5}{CR} = \underline{5.4} \text{ (6 NWAs for the mos/1-2 per week)}$$

5. Activity Objectives. Based on the last 12-months of data analysis, Activity Objectives are the number of AC, TC, DC, and OT contacts an OST needs to meet the monthly/weekly IO. Since the SOE tells the OSO how many contacts are necessary for it to obtain an interview for each activity, and the BP provides the percentage of interviews produced by each prospecting activity, the activity objectives can be determined by multiplying the monthly IO by the applicable SOE and the BP. It is important to note that office traffic is a passive activity. The OST has limited effects on OT; for this reason it is strongly recommended OSTs set higher TC, DC, and AC activity objectives to compensate for the unpredictability of OT.

For example:

$$TC: \quad \frac{19}{IO} \times \frac{5}{SOE} \times \frac{20\%}{BP} = \underline{19} \quad (19 \text{ TC contacts for the mos/5 per week})$$

$$DC: \quad \frac{19}{IO} \times \frac{3}{SOE} \times \frac{15\%}{BP} = \underline{8.6} \quad (9 \text{ DC contacts for the mos/3 per week})$$

$$AC: \quad \frac{19}{IO} \times \frac{7}{SOE} \times \frac{40\%}{BP} = \underline{53} \quad (53 \text{ AC contacts for the mos/13 per week})$$

$$OT: \quad \frac{19}{IO} \times \frac{6}{SOE} \times \frac{25\%}{BP} = \underline{29} \quad (29 \text{ OT contacts for the mos/7 per week})$$

CHAPTER 6

How to Create an Annual Plan

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	6001	6-2
PROCESS	6002	6-2

Chapter 6

How to Create an Annual Plan

6001. GENERAL. The annual planning process is a critical step in the annual recruiting cycle for an OST. Each OST will develop an annual plan focused on the accomplishment of its assigned mission. A well-prepared plan that is based on data analysis, and which focuses on historically challenging mission categories, will enable the OST to focus their efforts on those activities that will result in mission attainment. The annual plan is a flexible tool and will be adjusted throughout the year based on mission adjustments and situational requirements. The annual plan will be input in MCRISS-OSS, reviewed and approved by the RSCO, and forwarded to the MCD AOP for final review. The annual plan worksheets may be found in the MCRISS-OSS Mission Planner Module. Guidance on building the Annual Plan in MCRISS-OSS may be found in the MCRISS User Manual located on the MCRISS homepage.

6002. PROCESS. The annual planning process is divided into three parts: data collection, data analysis, and plan development.

1. Data Collection. The data the OST uses for developing the annual plan includes, but is not limited to, the following: Previous FY Results, Projected Mission Letter, Market Analysis, Quality Indicators, Processing and Administration Data, and the Last 12 Months of Data Analysis (from the Data Analysis Worksheet).

a. Previous FY Results. The Previous FY Results worksheet illustrates the OST's performance during the past FY. The worksheet includes the OST's mission, number of applicants contracted, and number of applicants shipped, all by category, component, and year-group/class. OSTs can compile this data utilizing the mission board, candidate record, and pool report.

b. Mission Letter. The OSO will obtain the projected mission from the RSCO and compare it to the previous year's mission; OSOs will make note of any increases in historically challenging mission categories. The annual planning process should begin as early as May, and be completed no later than 1 July for the upcoming FY.

c. Market Analysis. A Market Analysis is an in-depth examination of the information necessary to compare/contrast the demographics within the OSS area of operations. OST's will utilize the Market Analysis to identify the location of potential applicant populations by gender, race, approximate number of qualified applicants, and historical data identifying the number of visits to contract ratio for given locations. Chapter 7 will give a detailed description of how to develop the Market Analysis Worksheet.

d. Quality Indicators. The Quality Indicators Worksheet illustrates the competitiveness of the applicants the OST contracted during the past FY. The worksheet may be found in the Mission Planner/Annual Plan Module in MCRISS OSS. The worksheet automatically populates with the information the OST has input in MCRISS-OSS. The worksheet contains statistics such as GPA, SAT/ACT scores, ASTB scores, PFT scores, and waivers. This data enables the OSS to compare its applicants to the averages of those selected at District or Region selection boards. For example, if an OST has a high contracting rate, but a low selection percentage, the OST can analyze the quality indicators to determine if it needs to focus on higher quality applicants, physical fitness, etc.

e. Last 12 Months Data Analysis. The OST utilizes the last 12-months of data as a baseline for making planning assumptions. The last 12-months of data analysis worksheet includes the OST's SOEs, BPs, CR, PR, and SR; this data can be pulled directly from the Data Analysis Worksheet. New OSOs with less than 12 months of data will use the OSS' previous year's data for planning purposes; if the previous OSO's data is inaccurate, the new OSO will use the MCRC national averages in the development of his/her plan.

2. Data Analysis. After the OSO has collected all the required data, the OSO must analyze that data and establish some basic objectives upon which to build the plan. The OSO will utilize three planning documents during his/her analysis that will guide him/her throughout the planning cycle and the year. The three documents the OSO uses are the FY Number of Visits Worksheet, the Prospecting Planning Matrix, and the Objectives Sheets.

a. FY Number of Visits. The FY Number of Visits Worksheet lists all priority one, two and three universities, and reserve units in the local area, the OST's contracting goal for each university/reserve unit, and the number of visits the OST is planning on making to accomplish its contracting goal.

(1) OSOs will determine the OST's contracting goal for each priority university and reserve unit based on the OSO's mission letter, the market analysis and historical results. It is recommended the OST consider factors such as Qualified Candidate Population (QCP), Diverse Qualified Candidate Population (DQCP), and time/distance to travel to the universities/reserve units in determining contracting objectives.

(2) After determining the contracting goal, the OSO will use the Average Contracts per Visit (ACV) to determine the number of visits the OST needs to make to each university/reserve unit. The ACV is determined on the Market Analysis Worksheet, and covered in Chapter 7, but the below example is a brief description of how to determine the ACV:

For example: OST Denver visits CU Boulder 24 times for career fairs, table set ups, freshman orientations, etc. during FY15. During FY15, OST Denver attained 12 contracts from CU Boulder. Divide the number of contracts by the number of visits: 12 contracts divided by 24 visits = .5 average contracts per visit.

The OST will utilize the last three years of data to determine to the ACV.

(3) After the OSO has determined the contracting goal and the ACV for each university/reserve unit, the OSO will multiply the ACV by the contracting goal; the result will be the number of visits the OST should plan to visit each priority university and reserve unit.

b. Prospecting Planning Matrix. The Prospecting Planning Matrix assists the OSO in setting NWA, interview, and contact objectives based on the OST's mission and previous year's data. The OSO inputs the mission, SR, PR, and AC SOE into the worksheet, and the worksheet assists the OSO identifying goals.

For example: OST STL has a 4.5 SR, 1.5 PR, and AC SOE of 6. Assume the OST has a PLC 20 Ground mission of 2. The Prospecting Planning Matrix

will assist the OSO in determining the NWAs, interviews and contacts needed to accomplish this mission through the following computations:

$$\frac{2}{Msn} \times \frac{1.5}{PR} = 3 \text{ PLC Ground NWAs needed to make mission}$$

$$\frac{2}{Msn} \times \frac{4.5}{SR} = 9 \text{ PLC Ground Interviews needed to make mission}$$

$$\frac{9}{Int} \times \frac{6}{AC \text{ SOE}} = 54 \text{ PLC Ground contacts needed to make mission}$$

The OSO inputs the number of days the OST has to prospect on campus and the Prospecting Planning Matrix will assist the OST in determining the number of contacts the OST needs to achieve each day spent on campus. The Prospecting Planning Matrix assists the OSO in determining objectives for each mission category and component.

c. Objectives Sheet. The OST will utilize the Objectives Sheet to set activity objectives for the year based on the last 12-months of data. Refer to Chapter 5 for more information on setting activity objectives utilizing the Objectives Sheet.

3. Plan Development. Plan development is a step-by-step process and should incorporate input from all members of the OST. Elements of the annual plan the OST needs to develop include: a narrative addressing historically challenging mission areas, the Semester Visits Worksheet, the Orientations Worksheet, the Enhanced Area Canvassing (EAC) Events Worksheet, the Selected Marine Corps Reserve (SMCR) Unit Visit Worksheet, the Marine Corps Flight Orientations Plan (MCFOPs) Worksheet, the Presentations Worksheet, the Pool Functions Worksheet, the Career Fair Worksheet, the Internal Training Schedule Worksheet, and the Budget Worksheet. These worksheets, based off the data collection and analysis, will assist the OST in developing an effective and efficient plan focused on accomplishing its mission. Prior to beginning any worksheets, the OST should develop a calendar which annotates each school's schedule for planning purposes; this will allow the OST to plan effective visits. While planning visits, the OST will need to take into consideration school breaks, holidays, mid-terms, finals, contact-to-contract timeline, and OST processing considerations, etc. (Appendix G, OST Battle Rhythm provides a guideline of processing and mission requirements OSOs should factor into the annual planning process.) Each of the worksheets identified below may be found in MCRIS-S in the Mission Planner Module under the annual plan section.

a. Narrative. The OSO will develop a word picture describing the OST's plan to accomplish the mission. OSOs will focus specifically on the OST's plan to meet each historically challenging mission area.

b. Semester Visit Worksheet. The Semester Visit Worksheet identifies the days the OST plans to spend at each university/reserve unit. It contains the ACV, contracting goal and number of visits (all found on the FY Number of Visits Worksheet) in addition to the planned visit dates.

c. Orientations Worksheet. The Orientations Worksheet identifies any freshman orientations, transfer orientations (etc.), the contact information, and required logistical information for orientations the OST plans to attend.

d. Enhanced Area Canvassing (EAC) Events Worksheet. The EAC Events Worksheet identifies any EAC events (i.e. pull up challenge, etc.), contact information, and logistical requirements for EAC events the OST plans to attend.

e. SMCR Unit Visit Worksheet. The SMCR Unit Visit Worksheet identifies contact information for, and dates the OSO plans to visit, local reserve units. OSOs will contact the Inspector and Instructor Staff at the local reserve units to schedule visits for the year. Opportunities to interact with the local reserve units are limitless; at a minimum, OSOs will visit local reserve units twice per year to brief Marines on the opportunities available to them through the PLC and OCC programs.

f. MCFOP Worksheet. The MCFOP Worksheet identifies dates, point of contact information, and logistical requirements for MCFOP events the OST plans to conduct. The District AAOP is the Marine Corps Flight Orientations Program coordinator. OSOs will attempt to coordinate MCFOP events with the AAOP, but will need to be prepared to conduct MCFOPs events without the AAOP. Examples of MCFOPs events include air shows, flight club presentations, campus aviation presentations, aviation EAC events, etc.

g. Presentations Worksheet. The Presentations Worksheet identifies dates, the audience, contact information, and the topic of presentations the OST is planning to conduct. OSTs will plan to conduct leadership workshops, CFTs, etc. with appropriate organizations such as sports teams, university clubs, etc.

h. Pool Functions Worksheet. OSOs will develop a pool program that develops candidates and prepares them for selection, OCS, and TBS. The Pool Functions Worksheet is the OST's thoughtful plan toward developing and preparing candidates for their future, but the main focus should be on OCS. The Pool Functions Worksheet includes dates, event focus, location, cost, etc. Of the monthly pool functions the OSTs conduct, OSTs are required to conduct two specific functions: (1) a Warrior's Picnic at the beginning of every school year to build camaraderie amongst candidates and commend those who completed training at OCS, and (2) Pre-OCS training for candidates prior to shipping to OCS. When developing the Pool Functions Worksheet, it is recommended that OSOs consider university schedules. (Refer to Chapter 16 of this Guidebook for more information regarding the OST's Pool Program.)

i. Career Fair Worksheet. The Career Fair Worksheet lists all the career fairs including dates, registration information, point of contact information, cost, etc. for all the career fairs the OST plans to attend.

j. Internal Training Worksheet. Per Chapter 3, OSOs are required to coordinate 12 hours per quarter of internal training. The OSO will develop a training plan that meets the OST's individual needs, and compliments RS R&R training, District training, and MCRC training events.

k. Budget Worksheet. The Budget Worksheet identifies how the OSO plans to spend its allocated funds. The OSO will coordinate with RS Supply, the RS MPA, and the District Advertising Representative to determine the amount of money the OSO has available for pool functions, advertising, career fairs, EAC events, etc. The OSO will develop a plan to efficiently and effectively utilize the funds as necessary.

4. Annual Plan Considerations. The annual plan is the OST's action plan for accomplishing its mission. No Marine sets out on a mission without conducting the necessary preparation to succeed. OST's must develop thoughtful plans focusing on challenging mission categories. That being said, no plan survives first contact. Do not be afraid to adjust your plan. Use data analysis, monthly objectives sheets, and other systematic recruiting tools to adjust goals to ensure the OST achieves its mission.

CHAPTER 7

How to Conduct a Market Analysis

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	7001	7-2
BASIC PROCESS	7002	7-2
CAMPUS ASSESSMENT	7003	7-2
MARKET ANALYSIS	7004	7-3

Chapter 7

How to Conduct a Market Analysis

7001. GENERAL. This section identifies how to conduct a market analysis. OSTs can locate the Market Analysis Worksheet in the MCRISS-OSS Mission Planner Module under the annual plan section.

7002. BASIC PROCESS. The first step toward conducting a market analysis is conducting a detailed assessment of each university, college, and community college in the OST's area of operation (AO). The OSO will collect pertinent information on every school in the OST's AO to determine if he/she is going to classify each school as working or non-working. OSOs will utilize the College Profile Sheets in the Mission Planner Module in MCRISS-OSS to collect information. After an OST has collected all the pertinent information on the college profile sheet, the OST will compare and contrast schools to classify each school as working or non-working. If the OSO classifies a school as a working school, the OSO will assign it as a priority one, two, or three school. If the OSO classifies a school as a non-working school, that does not mean the OST does not work with applicants from that school, visit the school, or advertise at the school; it simply means the OST does not focus on that school as it does the priority schools. Once an OSO has completed the campus assessments, assigned schools as working or non-working, and assigned working schools as priority one, two, or three, the OSO will complete the Market Analysis.

7003. CAMPUS ASSESSMENT. OSOs will use a variety of tools to fill out the College Profile Sheets in MCRISS-OSS on each school in the OST's AO. During the campus assessments, the OSO will classify schools as either working or non-working, and prioritize working schools as priority 1, 2, or 3. Some of the tools the OSO will use include the Barron's Profile of American Colleges, university common data sets, school websites, OSS historical data analysis, etc. Factors the OSO will consider include, but are not limited to:

1. Number of full-time enrolled undergraduate students
2. Number of male/female full-time students
3. Number of African American, Hispanic, and students with Other ethnic backgrounds enrolled
4. Average SAT/ACT scores
5. Size of the incoming freshman class
6. Graduation percentage
7. ROTC presence
8. Clubs, organizations, sports, fraternities, sororities, etc. on campus
9. Tuition expenses
10. Types of degrees the campus offers
11. Time/distance

12. Number of candidates on campus, how many visits the OST has conducted each FY, and how many contracts the campus has historically produced per FY; these factors can assist in determining the propensity the student might have toward serving in the military

13. When applicable, the OSO should attempt to meet with local campus staff such as career center representatives, veteran's affairs representatives, etc.

7004. MARKET ANALYSIS. The Market Analysis is a tool for the OST; the OST uses the Market Analysis to assist with developing its focus of efforts during the recruiting year. After the OSO completes the campus assessments, has classified schools as either working or non-working, and has prioritized working schools, the next step is to complete the Market Analysis. OSO's will utilize data collected during the campus assessments to complete the Market Analysis. The below information are some basic instructions for completing the Market Analysis:

1. OSO determines school's priority as one, two, three, non-working, etc. based on the campus assessments.

2. BI is the Barron's Index located in the Barron's Profile of American Colleges. Barron's assigns each school a ranking based on the quality of the education, admissions competitiveness, etc.

3. Male/Female FTE = Male/Female Full-Time Enrolled (This data can be easily obtained by searching the university's common data set. Every school is required by law to publish certain information by June 1st every year. If the common data set is not posted online, check with school's Office of Institutional Research in the Registrar's Office.)

4. African American, Hispanic, Other. OSOs can locate this information in the university's common data set; it is the number of African Americans, Hispanic, and Other ethnic individuals seeking degrees.

5. % Qualified. OSOs can locate the percent qualified in the university's common data set. OSOs will determine the percent of students qualified with the SAT, and the percent of students qualified with the ACT, and combine them to determine the average.

Example: The University of North Carolina reports in their common data set that 78% of students who took the ACT are qualified with a composite score of 22 or above. The common data set also indicates that 82% of students who took the SAT scored above a 500 in the math and reading categories. Therefore, the average of 78% qualified with the ACT and 82% qualified with the SAT is 80% qualified.

The Market Analysis is a tool for the OST to utilize for planning purposes; it is not the "end all, be all" of the number of qualified individuals in the OST's AO. The OSO should make every effort to get the numbers as accurate as possible for planning purposes, but he/she should not get too focused attempting to identify exact numbers.

6. Qualified Candidate Population (QCP). The OSO identifies the QCP by multiplying the Male FTE x the % Qualified. (OSOs may see QCPM and QCPF; these abbreviations stand for Male Qualified Candidate Population and Female Qualified Candidate Population).

7. Diverse Qualified Candidate Population (DQCP). The OSO multiplies the sum of the number of African Americans, Hispanics, and Others, by the % Qualified. (OSOs may see DQCPM and DQCPF; these abbreviations stand for Male Diverse Qualified Candidate Population and Female Diverse Qualified Candidate Population).

8. ROTC. OSOs will list all ROTC units at the school. (A = Army, AF = Air Force, N = Navy)

9. Pool. This is the number of candidates from the school in the OST's Pool Program.

10. Distance/Time. This is the distance to the school, and the time it takes to get there. In MCRISS-OSS, this information will automatically populate on the Market Analysis if the data is entered on the College Profile Sheet.

11. FY V & C. This is the number Visits an OST made to the school during the FY, and the number of Contracts the OST attained from the school during the FY.

12. AVC (Average Contracts per Visit). The ACV is determined by dividing the total number of contracts during the last three FYs by the total number of visits during the last three FYs.

13. Reserve Units. OSOs will contact local reserve units to identify the number of Privates-Sergeants at their unit. Additionally, OSOs will annotate the number of PLC, OCC, and Minority contracts the OST attained from the reserve units during the last three years.

14. ROTC/JROTC. OSOs will be familiar with the number of ROTC/JROTC units in the OSTs AO. There are candidates at ROTC units who are not on scholarship and may be solid applicants for the PLC or OCC program. Similarly, OSOs should be aware of JROTC units in the OST's AO to identify possible incoming freshman interested in the military. If the OSO has a positive relationship with the ROTC/JROTC unit, the units will push prospect referrals to the OST.

CHAPTER 8

How to Work the College Relations Program

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL GUIDELINES	8001	8-2
COLLECTING & ORGANIZING SCHOOL INFORMATION	8002	8-3
WORKING LOCAL SCHOOLS	8003	8-4
MAINTAINING CONTACT WITH SCHOOLS	8004	8-4
KEY PROGRAM ACTION DATES	8005	8-5

Chapter 8

How to Work the College Relations Program

8001. GENERAL. The primary purpose of the College Relations Program is to foster positive relationships with college officials to establish a long-term relationship conducive to recruiting and mission attainment.

1. The colleges and universities in the OST's AO are the major source of quality prospects. To identify and meet the greatest number of students in these schools, OSTs must establish good rapport with university staffs to maximize exposure on campus; this will assist the OST in executing and maintaining an effective college relations program. OSTs can maximize awareness of Marine Corps commissioning programs through conducting presentations, distributing literature, conducting meetings with school officials, and students. OSTs can also utilize independent career advertising websites such as LinkedIn, Career Builder, and Monster, to help gain exposure on campus. OSTs will maximize efforts at working schools; however, the OST must not completely neglect non-working schools. The OST must maintain a presence throughout the AO. Chapter 7 describes how an OSO will prioritize universities.

2. The goal of the college relations program is to build rapport and gain exposure at universities by establishing positive long-term relationships.

a. Benefits of building rapport and gaining exposure.

(1) May assist in gaining access to area canvass, give presentations, interview prospects and distribute Marine Corps literature at the school.

(2) May assist in developing opportunities to educate school officials, faculty members, and students about Marine Corps Commissioning programs and opportunities. This will lead to referrals.

(3) Will create a positive and lasting impression of the Marine Corps across the entire campus.

(4) May assist in obtaining student information from key personnel.

4. Objectives. The success of the College Relations Program depends on the aggressive execution of the OST's annual plan. The plan begins 1 July each recruiting year and focuses on the following four objectives:

a. Initial Visits. The initial visit is the first formal visit of the program year. During the visit, OSOs inform college officials about the various programs and opportunities the Marine Corps offers to the students. The goal of an initial visit is to confirm scheduled events and complete the College Profile Sheets. College Profile Sheets are maintained in MCRISS-OSS in the Mission Planner Module; they will contain up-to-date information relating to the recruiting activities at the university.

b. School Lists. Federal law requires public colleges and universities to provide a list of currently enrolled students to the military. Schools are required to provide information such as name, class, date of birth, gender, and contact information. Schools are not required to provide race, ethnicity, or email addresses; however, many will provide this information if the OST has developed a positive relationship with campus officials. OSTs

may use the information on the list for sending mass emails through the email generator on the Advertising Portal, conducting mail outs, making telephone calls, etc. OSTs will request the school list from the Registrar's Office of Institutional Research. Colleges and universities are able to charge military recruiters a fee for the school list if they charge every entity requesting information the same fee. OST's will work with their RS Supply section to have the government pay for the list. If an OST has difficulty attaining a school list from a public university, the OST will refer university officials to the Solomon Amendment and report the issue to the OST's chain of command.

c. Campus Visits. Campus visits include prospecting activities such as: conducting table set-ups, leadership seminars, presentations, attending career fairs, etc.

d. Final Visits. The final visit is conducted to close out the current academic year; the OSO conducts the visit toward the end of the second semester. During the visit, OSOs will attempt to discuss with school officials how the OST's interaction with the school during the past year has affected the attitudes of the faculty regarding the Marine Corps. Additionally, the final visit is the time to begin gathering statistical information about the upcoming year; the OSO should also propose possible dates for meetings with school officials for the upcoming fall semester.

8002. COLLECTING AND ORGANIZING SCHOOL INFORMATION.

1. To develop a plan for the upcoming FY college relations program, the OST must gather, organize, and access current information about local colleges and universities. To do this, OSOs will:

a. Review school websites including, but not limited to, the athletic department pages, career center page, ROTC unit pages, school of engineering pages (for aviation applicants), etc.

b. During the annual planning process, organize the information obtained regarding each school by updating the existing College Profile Sheet for the upcoming mission year.

2. OSOs should consider the following for identifying potential resources in the area:

a. What strengths does the OST possess that may be of value to the school, and of interest to the students?

b. What additional resources are available in the area? Are their prior Marines, or other former service members, at the school in positions such as the Board of Regents/Trustees, professors, coaches, etc.? Are there any Marine alumni or possible support in local reserve units, the Command Group, NROTC units, the Marine Corps League, etc. OSO's should also research if there are any faculty members that have an affiliation with the Marine Corps (i.e. family member in the Marine Corps).

c. Permissive Temporary Additional Duties (PTAD) Lieutenants awaiting TBS or flight school can assist the OST's on-campus efforts.

d. Consider inviting influential college or university officials to the Educators Workshop, MCFOP events, or other higher headquarters Center Of Influence (COI) events.

e. What promotional materials does the MCD/RS/OSS have to offer the school?

8003. WORKING LOCAL SCHOOLS.

1. Visit Planning Card. The Visit Planning Cards assist the OST in systematically working assigned schools and carrying out the annual plan. The Visit Planning Card tracks minimum program requirements and action dates. All scheduled visits and other relevant information is recorded on this card. Visit Planning Cards are located in MCRISS-OSS in the Mission Planner Module.

2. Preparing For Your Initial Visit.

a. The initial visit is crucial and its importance cannot be overemphasized; it will set the tone of the OSOs relationship with the school for the upcoming year. OSOs will make an appointment with appropriate school officials, and have an action plan for discussion topics. OSOs should attempt to meet with career center representatives, athletic department representatives, diversity affairs organizations, ROTC unit staff, etc. OSOs will record initial visit information on the Visit Planning Card.

b. OSOs must prepare prior to conducting the initial visit. Prior to the visit, OSOs will have completed researching the school and will have established goals for the visit.

c. Examples of goals might include:

- (1) Identify PFT locations
- (2) Identify process for scheduling table displays and registering for career fairs
- (3) Identify interview locations and testing rooms
- (4) Identify locations for Take-One stands
- (5) Identify advertising opportunities
- (6) Identify procedures for scheduling information sessions

3. Conducting the Initial Visit. When conducting the initial visit, OSOs will brief university representatives on the benefits of the PLC and OCC programs and their value to the students and the university.

4. Concluding the Initial Visit. Following the initial visit, OSOs will enter relevant information in the Mission Planner Module of MCRISS-OSS on the College Profile Sheets, the College Visit Cards, and the Contact Cards. (Refer to Chapter 20 of this Guidebook for additional information regarding the Contact Card.)

8004. MAINTAINING CONTACT WITH SCHOOLS. Following the initial visit, OSOs will use the Contact Cards and College Visit Cards in MCRISS-OSS to plan and schedule routine follow ups with university staff and campus prospecting. It

is imperative that OSOs maintain a constant and consistent presence on campus to maintain effective relationships. To improve and maintain relationships with university staff and students, OSOs will conduct events such as the following:

1. Meet with athletic directors and coaches to discuss leadership training opportunities for university sports teams.
2. Periodically inform career placement counselors of changes or developments in the officer programs.
3. Schedule and conduct presentations in accordance with the annual plan.
4. Advertise in school media such as newspapers, on websites, local radio and TV programs, sports programs, etc.
5. Incorporate candidates into campus visits to enhance exposure to the rest of the student body.
6. Arrange to have commissioning ceremonies on campus and take advantage of opportunities to advertise when possible.
7. Discuss opportunities for influential university staff to participate in the Educator's/Key Leader's Workshop.

8005. KEY PROGRAM ACTION DATES. OSOs will use the action dates below as a guide for establishing and maintaining the college relations program.

1. July - August.

- a. Register for/attend freshman orientations.
- b. Schedule table displays for the fall semester.
- c. Register for career fairs for the fall semester.
- d. Put up posters and replenish material in Take-One stands.
- e. Conduct Initial Visits.
- f. Update Visit Planning Cards, Contact Cards, and College Profile Sheets.
- g. Request school lists.
- h. Coordinate advertising.

2. September - October.

- a. Complete Initial Visits to working schools.
- b. Visit athletic directors, coaches, and physical education instructors to schedule presentations.
- c. Meet with student organizations to schedule presentations.

d. Begin identifying participants for the Educator's/Key Leader's Workshop.

e. Conduct campus prospecting visits.

3. November - December.

a. Analyze/adjust the Annual Plan for the spring semester to overcome mission shortages.

b. Work all candidates for referrals.

c. Schedule table displays for the winter semester.

d. Register for career fairs for the winter semester.

e. Put up posters and replenish material in Take-One stands.

f. Conduct campus prospecting activities.

g. Continue attempting to identify participants for the Educator's/Key Leader's Workshop.

4. January - February.

a. Meet with athletic coaches whose teams were in season during the OSO's previous visit in the fall.

b. Work all candidates for referrals.

c. Conduct campus prospecting activities.

d. Obtain NROTC non-select list from RS XO.

5. March - April.

a. Begin finalizing guest list for the Educator's/Key Leader's Workshop.

b. Begin coordination for freshman orientations as appropriate.

c. Obtain NROTC non-select list from RS XO/District AOP shop.

d. Conduct campus prospecting activities.

5. May - June.

a. Attend appropriate college graduations.

b. Conduct Final Visits and update MCRISS-OSS Visit Cards, College Profile Sheets, and Contact Cards as appropriate.

c. Plan recruiting activities for summer schools and orientations.

d. Finalize roster for Educator's/Key Leader's Workshop.

e. Create College Profile Sheets for next year's program.

- f. Begin annual planning for the next fiscal year's mission.
- g. Conduct commissioning on campus if able.
- h. Begin coordinating advertising for the upcoming FY.

CHAPTER 9

How to Use Your Sales Tools

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	9001	9-2
BENEFIT TAGS	9002	9-2
PROOF SOURCES AND VISUAL AIDS	9003	9-4

CHAPTER 9

How to Use Your Sales Tools

9001. GENERAL.

1. Marine Corps Communication and Consulting Skills (MC3) requires the OST to interview prospects, explore needs and motivators, and enable with features and benefits. Members of the OST will also respond to refusals, doubts, objections or disinterest, and gain commitment. As with any sales presentation, it is imperative the OST member conducting the interview builds rapport and listens with purpose throughout the interview process.

2. Sales Tools.

a. Benefit Tags. Benefit tags are an exploring tool an interviewer uses to help uncover a prospect's needs and motivators. There are 14 benefit tags that can be divided into two general categories - tangible benefits and intangible benefits. An OST member conducting an interview, will not conduct an interview on a prospective applicant without utilizing benefit tags. Conducting interviews without benefit tags leads to the interviewer making assumptions about why the applicant wants to be a Marine Officer, and prevents the interviewer from gaining insight to what might be a reason for not committing.

b. Marine Corps Communication and Consulting Skills (MC3). Marine Corps Communication and Consulting Skills are selling techniques all Marines on recruiting duty learn to help them build rapport, listen with purpose, explore needs and motivators, enable needs and motivators, gain commitment and handle prospect objections and disinterest. In addition to Refresher and Reinforcement (R&R) training, OSOs and OSAs should periodically review MC3 to maintain their skills. Refer to MC3 course materials and the RS RI Shop for training guidance.

c. Proof Sources and Visual Aids. Using proof sources and visual aids enhances an interviewer's ability to connect with potential applicants. Examples of proof sources and visual aids include the Marine Corps Officer Opportunities Book (MCOOB), videos, collateral material such as military pay charts, etc. A proof source or visual aid is any miscellaneous tool which assists the interviewer to enable the needs and motivators, thereby giving the interviewer the tools to help demonstrate the features, not just talk about them.

9002. BENEFIT TAGS.

1. After an OSO has built rapport with a prospect and screened the individual for disqualifying conditions, interviewers use open and closed questions to explore a prospect's needs and motivators during an interview. Benefit Tags are the tool interviewers use to assist in uncovering the prospect's needs and motivators.

2. There are 14 Benefit Tags that represent some of the features of the Marine Corps. The tags can be divided into two categories: tangible and intangible benefits.

a. Intangible Benefits. Intangible benefits are the mental features individuals understand to be unique in the Marine Corps. The intangible benefit tags are:

- (1) Pride and Honor of a Marine Commission
- (2) Self-Reliance, Discipline, Responsibility
- (3) Patriotism
- (4) Professional Development & Personal Growth
- (5) Challenge

b. Tangible Benefits. Tangible benefits are the features that all the military services provide. The tangible benefit tags are:

- (1) Post-Graduate Education
- (2) Financial Security, Advancement & Benefits
- (3) Leadership/Management Training & Experience
- (4) Travel and Adventure
- (5) Physical Fitness
- (6) Tuition Assistance
- (7) Career Variety
- (8) Equal Opportunity
- (9) No Obligation until Graduation

3. Purpose of Using Benefit Tags. The primary purposes for using Benefit Tags are:

a. To uncover prospect priority needs and motivators that drive action and can be satisfied by a benefit that the Marine Corps can provide.

b. To maintain control of the interview by using the tags to create a framework for structuring the entire interview.

c. To give direction to the interview by focusing on what the prospect wants to talk about.

d. To determine when to gain a commitment.

e. Benefit tags are also useful during telephone prospecting. The tags can serve as a visual reference for OST members to elicit prospect interests over the phone.

4. Procedures for Using Benefit Tags.

a. Prior to an interview, the interviewer will develop a plan or strategy for using the tags based on the prospect's background and profile. Interviewers will consider factors such as the prospect's:

(1) Education status (student/graduate)

(2) Age

(3) Sex

(4) Marital status

(5) Currently employed/unemployed

(6) Mental aptitude

(7) Home environment/Influencers

(8) Other information on the prospect's needs, motivators, and interests gathered from initial contact and screening

b. Interviewers will role play or rehearse using Benefit Tags prior to the interview when applicable.

c. During the interview, the interviewer will introduce the Benefit Tags by using an engaging statement and asking the applicant to review the tags. After the prospective applicant places the tags in their order of priority, the interviewer will explore the prospect's needs and motivators. Exploring creates a reason for the interviewer to use the benefit tags the prospect selected. Every applicant will require a different amount of exploring to uncover their needs and motivators. Refer to MC3 course materials and the RS RI Shop for more information on engaging prospects.

d. Interviewers will pose the prospect's prioritized benefit tags to them verbatim from the tag, and in the form of an open question. For example, "What does Self Reliance, Direction, and Discipline mean to you?" This obligates the prospect to pick all or part of the tag, and explain the significance of the tag in relation to the applicant's position.

e. Be aware that prospects do not always clearly state their needs and motivators, deeper exploring is often necessary.

f. During the interview (sales presentation), the interviewer must focus on the prospect's needs and motivators uncovered by the use of the Benefit Tags. A Benefit Tag is not a feature or opportunity unless it satisfies the prospect's real need(s). The interviewer must translate each feature into a benefit that enables the prospect's needs. There is no single script to follow; interviewers must continue to personalize and enhance their presentation and sales skills based on the interviewer's personality, strengths, and weaknesses. OSTs can use an Interview Observation Form to continue to train and enhance presentation and skills.

9003. PROOF SOURCES AND VISUAL AIDS.

1. Marine Corps Officer Opportunities Book (MCOOB).

a. The MCOOB is used to reinforce enabling statements and responding to "doubts it" objections. (Refer to MC3 course materials)

b. Each member of the OST will personally and professionally customize their MCOOB to align with their personality/character.

2. Other Proof Sources and Visual Aids. In the event the MCOOB does not provide adequate material to gain commitment, interviewers may decide to use other proof sources. Additional proof sources include:

- a. Videos (the RS MPA can provide the OST with current videos)
- b. Collateral material
- c. Local contacts and former Marines
- d. Magazine and newspaper articles
- e. Candidates
- f. PTAD officers
- g. Other OSOs [Aviators (AAOP), Females and/or Diverse Officers]
- h. Reserve Support Officer (RSO)
- i. Online content from MarineOfficer.com
- j. Officer Programs Book
- k. Marine Officer Instructor (MOI)
- l. Inspector and Instructor (I&I)
- m. Candidate Pool Board
- n. Photos of former candidates (before/after)
- o. Appropriate Marine Corps Orders, bulletins and magazines
- p. Testimonial letters

3. Factors to Consider When Using Other Proof Sources and Visual Aids. The OST must be aware of, and apply, every asset at their disposal which may be used as additional proof sources/sales tools. When using proof sources and visual aids, the interviewer must consider and be prepared for factors such as the following:

a. Plan for using the proof source (i.e. ensure the interviewer is aware of what information the proof source will relay to the prospect; brief proof sources on information that may assist the proof source)

b. A video/proof source, etc. may prompt other questions or concerns

c. When using multimedia, be sure to follow the below guidelines:

(1) Ensure the OST reviews all multimedia for content and understanding

(2) Turn the volume down on videos so that you can expound on points when applicable

(3) Ask questions periodically throughout the multimedia presentations (i.e. "Can you see yourself doing that?")

(4) Observe the prospect's body language for "buy-in signals"

4. When the interviewer encounters doubt from a prospect and using proof sources is not working, the interviewer will need to explore further to understand what is creating the prospect's doubt. After the interviewer identifies the cause of the prospect's doubt, the interviewer will attempt to use additional proof sources/visual aids to gain commitment.

CHAPTER 10

How to Work A Prospect Using The Prospect Applicant Card (PAC)

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	10001	10-2
HOW TO USE THE PAC AS A SCREENING TOOL	10002	10-2
HOW TO USE THE PAC AS A TRACKING TOOL	10003	10-3
USING THE PAC FOR NEW WORKING APPLICANTS	10004	10-4
PROSPECT APPLICANT CARD UTILIZATION CONSIDERATIONS	10005	10-4
FINAL DISPOSITION OF THE PAC	10006	10-5

CHAPTER 10

How to Work A Prospect Using The Prospect Applicant Card (PAC)

10001. GENERAL. The OST uses the PAC as a recruiting tool to screen, maintain contact with prospective applicants, and track applicants through their processing toward contracting for officer program selection boards.

1. After a member of the OST meets a prospective applicant (a contact), the OSO or OSA will enter the prospect's contact information in the Prospect Board Module of MCRISS-OSS. MCRISS-OSS requires the OSO or OSA to enter basic information such as name, gender, race/ethnicity, contact information, recruiting source and activity, school, and projected graduation year for the system to save the contact's information accurately. Once the OSO/OSA enters the prospect's information in MCRISS-OSS, the prospect will be listed as a "Lead" in the Prospect Board Module; MCRISS will also count the prospect as a "Contact" on the OST's Schedule Module in MCRISS-OSS.

2. After the OSO/OSA enters the prospect in MCRISS-OSS as a Lead, the OSO/OSA will schedule the prospect for the appropriate follow up. Appropriate follow ups include scheduling a time for the OST to call the prospect and more-thoroughly screen the individual, or scheduling an appointment if the OST already thoroughly screened the prospect, etc. When the OSO/OSA schedules the initial follow-up action, the OSO/OSA will update the PAC's "Action Date" to reflect the same date as the scheduled follow up. Refer to the MCRISS User Manual on the MCRISS homepage for additional MCRISS-OSS instructions.

10002. HOW TO USE THE PAC AS A SCREENING TOOL.

1. The OSO/OSA uses the PAC to record basic personal information and qualification information for the prospect. The PAC serves as a tool for the OST to screen prospective applicants to assist in determining program eligibility and to record the information for future reference. Examples of the type of information on the PAC include:

- Education information
- Personal contact information
- Height/Weight
- Program for which the applicant is interested in applying
- Projected commissioning fiscal year
- How the OST met the prospect (Source and Activity)
- Date of birth
- Marital status
- Vision status
- Medical conditions/history
- Physical fitness ability
- Tattoos
- Arrests
- Drug history
- Needs/Benefit Tags (to record information after the interview)

2. The OSO/OSA will record all screening information on the PAC to enable any member of the OST to examine the PAC and conduct an appointment, follow

up, etc. It is imperative that OST members make accurate and appropriate comments on the PAC to enable any member of the OST to work the PAC.

3. After the OSO/OSA completes the PAC with the appropriate information, the OSO/OSA will change the status of the card from a "Lead" to a "PAC."

4. If after screening the OSO/OSA determines an applicant is Temporarily Disqualified from the officer programs, the OSO/OSA will record the pertinent information on the PAC and update the status of the card from "Lead" or "PAC" to "TDQ." If the prospect is temporarily disqualified, the OSO/OSA will schedule the applicant for a follow-up at a time and date determined by the OSO/OSA to maintain contact with the prospect (See Paragraph 10005).

5. If an applicant is Permanently Disqualified from the officer programs, the OSO/OSA will record the pertinent information on the PAC and update the status of the card from "Lead" or "PAC" to "PDQ." Additionally, the OSO/OSA will contact the local Recruiting Sub-Station (RSS) to refer the prospect for enlistment.

10003. HOW TO USE THE PAC AS A TRACKING TOOL. The PAC serves as a record for the OST's contact with the prospect. Any time a member of the OST conducts a follow-up, an appointment, a PFT, administers an ASTB-E, etc. for the prospect, the OSO/OSA will record the action on the PAC to enable all members of the OST to understand the prospect's status in the program and enable them to communicate effectively with the prospect.

1. Any time the OSO/OSA conducts a follow-up (phone call, appointment, PFT, etc.), the OSO/OSA will schedule the next appropriate follow-up on the PAC and update the PAC's "Action Date" to reflect the date of the next follow-up.

2. When the OSO/OSA conducts a follow up, it is imperative the OSO/OSA enter notes from the follow up on the PAC. Detailed notes on the PAC enable every member of the OST to understand the prospect's status in the program and communicate effectively regarding the prospect's next step in the process.

3. In the event the OSO/OSA attempts to follow-up with a prospect and the OSO/OSA is unable to reach the prospect, or a prospect fails to show for a scheduled appointment, PFT, ASTB-E, etc., the OSO/OSA will make a note on the PAC and schedule the prospect for the next appropriate follow-up. Additionally, the OSO/OSA will update the PAC's "Action Date" to reflect the date of the next follow-up.

4. When the OSO/OSA schedule the prospect for a follow up (telephone call, PFT, appointment, ASTB-E, ASVAB, etc.) on the PAC, the follow up appears on the OST's daily/weekly/monthly schedule in the Schedule Module in MCRISS-OSS. Scheduled follow-ups, in combination with information from the annual plan (such as scheduled table set ups, career fairs, pool functions, etc.), all appear on the OST's schedule for the day. The OST's plan for conducting follow-ups, appointments, prospecting, etc., all appear on the OST's Daily Plan (and appear on the OST's Week-in-Sight and Month-in-Sight).

5. When the OSO/OSA schedules a prospect for an appointment, and marks the appointment complete as an interview in MCRISS-OSS, MCRISS-OSS records the data in multiple locations. MCRISS-OSS will record the appointment and interview on the OST's numbers (number of contacts, appointments, and interviews for the day) on the Daily Plan in the Schedule Module (which in

turn populates the OSS' Monthly Prospecting Results and Monthly Activity Report), and the interview appears on the OSS' Interview Log.

10004. USING THE PAC FOR NEW WORKING APPLICANTS. When a prospect commits to applying for an officer program, the OSO/OSA will declare the prospective applicant as a New Working Applicant (NWA) on the PAC.

1. Prior to declaring the prospect as an NWA, the OSO/OSA must take special care to ensure the information on the PAC is up-to-date and accurate. After the OSO/OSA declares the applicant as an NWA, the OST will be unable to alter some of the information on the PAC.

2. When the OSO/OSA declares the prospect as an NWA, MCRISS-OSS will create a record for the applicant in MCRISS-OS (the Officer Processing link on the MCRISS homepage). The NWA's record in MCRISS-OS is the record the OST will utilize for processing waivers, change requests, and other applicant/candidate processing data. Additionally, the record in MCRISS-OS is the record the District and the Region will use for selection boards, scheduling candidates for OCS, scheduling commissioning, etc.

3. The OST will continue to utilize the PAC in MCRISS-OSS for recording follow-ups, PFTs, testing, etc. required for processing.

4. After the OSO/OSA declare the applicant as an NWA in MCRISS-OSS, the NWA will appear on the OSS' NWA Board in the NWA Board Module of MCRISS-OSS and on the OSS' Monthly Activity Report.

5. MCRISS-OS also has an NWA view. The NWA view in MCRISS-OS enables the OST to track each NWA's progress through the application process by updating the applicant's record in MCRISS-OS. It is important to note that the District, Region, and MCRC track the number of NWAs in MCRISS-OS for mission tracking purposes. If the OSO decides to drop an NWA, or the NWA decides not to apply, the OSO must change the NWA's status in MCRISS-OS. (Refer to the MCRISS User Manual on the MCRISS homepage for further instructions on how to use MCRISS.)

10005. PROSPECT APPLICANT CARD UTILIZATION CONSIDERATIONS.

1. It is vital the OSO/OSA conduct the following when utilizing the PAC:

a. Enter information complete and accurately on the PAC (i.e. tattoos, drug history, test scores, etc.). An OST will waste time following up with and processing an applicant who may not be qualified if the OSO/OSA do not record complete and accurate information on the PAC.

b. Enter appropriate notes on all follow-ups. Any member of the OST should be able to open a PAC and determine the prospect's eligibility and status in the program.

c. Mark all follow-ups (telephone calls, appointments, PFTs, etc.) as complete, with notes, and schedule the next follow up. When doing so, the OSO/OSA must also update the "Action Date" on the PAC.

2. Screening is continuous. The OSO/OSA will continuously screen prospects and applicants for qualification throughout the contact-to-contract chain to prevent wasting both the OST and the prospect/applicant's time.

3. Do not discard PACs on uninterested or TDQ prospects. Life circumstances change frequently. OSTs will schedule follow-ups for uninterested and TDQ applicants utilizing the two-month or three-month rule. Schedule uninterested and TDQ applicants for a follow up 2, 4, or 6 months out using the two-month rule, or 3, 6, or 9 months out using the three-month rule.

4. Solid and steady PAC creation is the key to success in the OST. The OST must continuously prospect for new applicants to fulfill its challenging mission. Evaluating PAC generation is one factor the OST can utilize in self-analysis to determine whether or not the OST is conducting enough prospecting to achieve its mission.

10006. FINAL DISPOSITION OF THE PAC.

1. When the OSO contracts an applicant, the OST will take the appropriate steps to contract the applicant in MCRISS-OS. After the OSO contracts the applicant in MCRISS-OS, the OST will begin using the Pool Card in MCRISS-OSS to track contact and other officer programs related information for the applicant/candidate.

2. PACs will be continually scheduled for follow-ups and action dated until an individual is either disqualified or has lost interest. The OST will make a minimum of four attempts to contact the prospect via telephone and email prior to moving the PAC to the PDQ folder in MCRISS-OSS.

3. OSTs will refer prospects who are no longer interested in, or eligible, for officer programs to the appropriate RSS.

CHAPTER 11

Telephone (TC) Techniques and How to Conduct TC Prospecting

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	11001	11-2
DEFINITION OF A TC CONTACT	11002	11-2
TARGETED TC PROSPECTING	11003	11-2
PREPARING FOR TC PROSPECTING	11004	11-3
PLANNING AND SCHEDULING TC PROSPECTING	11005	11-3
TC PROCEDURES	11006	11-3
TC TECHNIQUES MODEL	11007	11-4

CHAPTER 11

Telephone (TC) Techniques and How to Conduct TC Prospecting

11001. GENERAL. OSOs utilize TC techniques on a daily basis when calling OPPCs and conducting follow-ups with prospective applicants. In addition to these uses of TC techniques, OSOs will use TC techniques in TC Prospecting. TC prospecting can be valuable when used effectively. The most valuable use of TC prospecting for the OST will occur when the OST conducts targeted TC prospecting. Prior to conducting any TC activity, the OST must first understand the definition of a TC contact.

11002. DEFINITION OF A TC CONTACT. For officer recruiting purposes:

1. The OST will count a contact as a TC when:

a. The OST **initiates** a telephone call with the purpose of scheduling an appointment **and makes contact** with a prospect.

b. The TC will only count as a contact when the OSO/OSA make contact with a prospect for the first time, **and the OST determines the prospect is a contact based on the definition of a contact in Chapter 5 of this Guidebook**.

2. The OST will not count a contact as a TC contact when:

a. A contact initiates the call (the OST would record this prospect in MCRISS-OSS as an "OT" Activity and "Cal" Source).

b. The OST obtained the prospect's phone number from another activity such as Area Canvassing (AC).

3. As with other recruiting definitions, the key is accuracy and consistency. Recording accurate and consistent data will enable the OST to conduct effective analysis and set appropriate objectives for efficient and effective recruiting.

11003. TARGETED TC PROSPECTING. What is targeted TC prospecting? Targeted TC prospecting is focusing the OST's TC prospecting efforts on the more challenging categories of the OST's mission. This may include aviators, freshman for the PLC mission, seniors for the OCC mission, females, or diversity.

1. Targeted TC prospecting begins with the school list the OST obtains from the college or university's Registrar's Office. Colleges and universities are required to provide military recruiters with students' class, major, and gender (among other things), but they are not required to provide race and ethnicity; however, if an OST maintains an effective college relations program, the OST will often be able to obtain students' race and ethnicity.

2. In the event the OST is unable to obtain a school list including race and ethnicity, or other relevant data to support targeted prospecting, the OST will need to conduct some basic research. OSTs can often use school websites (university athletic teams) and social media (university clubs, groups, fraternities, sororities, etc.) to identify potential prospects to cross-reference with the school list to support targeted TC prospecting.

11004. PREPARING FOR TC PROSPECTING. The OST will prepare for TC prospecting in the following manner:

1. Review MC3.
2. Conduct role-play training.
3. Develop and use talking points to handle the bad situations (i.e. hostile prospects, disinterest, or negative attitudes).
4. Be prepared for the TC by having the following available:
 - a. Benefit tags and MCOOB.
 - b. TC talking points.
 - c. MC3 skill guide card.
5. Start with a positive attitude and consider every contact as a potential contract.
6. Ensure the office environment is conducive for making telephone calls by minimizing disruptions and distractions.

11005. PLANNING AND SCHEDULING TC PROSPECTING. OSTs conduct TC prospecting during the periods of the day when the majority of prospects are likely to be "available." OSTs will consider the school calendar, social patterns, etc. to determine the best times to TC prospect. When conducting targeted prospecting, OSTs should attempt to contact individuals on different days and at varying times to ensure the maximum chance of success at contacting the prospect.

11006. TC PROCEDURES. The primary purpose of conducting any TC activity is to make contact with the prospect and obtain an appointment. The OSO/OSA should present only enough information to create an interest in the officer programs, and the desire to seek more information through an appointment. The procedures for conducting a TC include:

1. Verify the individual on the phone is the intended prospect.
2. Identify yourself as the Marine Officer Selection Officer/Assistant.
3. Engage, build rapport, listen with a purpose.
4. Ask questions to explore the prospect's needs and motivators. If the prospect is unwilling to continue the conversation, be prepared to respond to disinterest, objections, or refusal.
5. Based on the prospect's needs and motivators, respond to the prospect in a way that might generate interest in the Marine Corps.
6. Attempt to schedule an appointment with the prospect. After the OSO/OSA schedules an appointment, confirm the time and location, and ensure the prospect possesses the OSO/OSA's contact information.
7. Conduct basic screening.

8. Enter the contact's information in MCRISS-OSS.

9. Analyze the results. What went well? What did not go well? What could you have been done better? Was the objective accomplished? If not, why not?

11007. TC TECHNIQUES MODEL. The following is an example of a TC with an aviation prospect.

1. Verify the individual on the phone is the intended prospect. After contact is made, ensure you are talking to the right person by asking his or her full name and which school they are attending or are graduating from.

EXAMPLE 1: "Hi, may I speak to Steve? Is this Steve Johnson who attends the University of Michigan?"

2. Identify yourself as the Marine Officer Selection Officer/Assistant.

EXAMPLE: "This is Captain John Best with the Marine Corps Officer Programs."

3. Once the conversation begins, the OSO/OSA engages the prospect. The OSO/OSA engages the prospect to explain why the OSO/OSA is calling and to get the prospect to agree to speak with you. The steps for engaging are:

- a. Transition to business.
- b. State the agenda and its value.
- c. Test for yes.

EXAMPLE: "Steve, I'm calling today because I wanted to speak with you about the Marine Officer Programs. I understand you're majoring in commercial aviation and I wanted to speak with you about the Marine aviation program. What I'd like to do is ask you some questions to determine if you're basically qualified. If you are, we can set up a time to meet and discuss the Marine Officer programs so you can determine if the Marine Corps can help you reach some of the goals that you have planned for yourself. How does that sound?"

4. The OSO/OSA will use MC3 to respond to disinterest. As a reminder, MC3 skills include:

- a. Ask questions to understand the disinterest.
- b. Respect the disinterest.
- c. State the value of continuing the conversation.
- d. Test for yes.
- e. Explore.

EXAMPLE:

Prospect: "Sorry, but I'm not really interested. I plan on graduating next May and getting a job as an instructor pilot to get my

required hours so I can fly commercial aviation. So I really don't see a need to join the Marine Corps."

OSO: "Well thanks for being up front. It sounds like you have a good plan. Since this is the first time I've had a chance to talk with you, could I have a minute of your time to ask you a few brief questions about your plans after graduation? I might be able to give you some information that could be really useful to you. Do you have a couple of minutes?"

5. After receiving permission to explore, the OSO/OSA needs to create the prospect's awareness of their needs by exploring their needs and motivators. Once the OSO/OSA accomplishes this, the OSO/OSA will confirm the existence of the prospect's need.

EXAMPLE:

OSO: "So Steve, you are a junior this year, is that right?"

Prospect: "Yeah."

OSO: "Do you already have your pilot's license?"

Prospect: "No, I'm close, but I probably won't get my license until some time next year."

OSO: "You mentioned earlier that you're interested in being a commercial pilot, is that right?"

Prospect: "Yeah, I'd like to fly for one of the major carriers. I understand it's going to take me awhile to get there, but I'm willing to spend some time as a flight instructor or flying for a local commuter until I can get the hours and instrument ratings I need to apply for one of them."

OSO: "Let me ask you this, why are you interested in being a pilot?"

Prospect: "My father flew for American Airlines. I've spent a lot of time around the aviation community and I've wanted to be a pilot ever since I was a little boy."

OSO: "You mentioned earlier that you're willing to work as a flight instructor or flying commuter planes until you get your hours and instrument ratings before you can apply for one of the major carriers. Do you know about how long it will take you to get the required number of hours you need, and how much money it will cost you to get the instrument ratings?"

Prospect: "Well, a family friend just got hired by United. He told me that I need to have 1000 hours before a major carrier will hire me; I'm expecting that to take about five-to-seven years as a flight instructor and flying commuters. As far as the cost goes, I know it's not cheap; I've heard my multi-instrument rating is going to cost more than \$20,000."

OSO: "How do you feel about spending all that money and time with no guarantee you're going to get hired by one of the major carriers?"

Prospect: "It really doesn't thrill me, but that's how it seems to work."

OSO: "It sounds like that could be a frustrating situation."

Prospect: "Yeah, but there's really no way around it."

OSO: "Steve, let me ask you a serious question. What's going to happen to you and your future plans if you spend all that money and time getting your hours and instrument ratings but you're still not able to get hired by one of the major carriers after five years? Are you going to be happy having spent all that money and time with no return on the sacrifices you've made?"

Prospect: "I'm not going to lie, that would be disappointing but I don't see any way around it."

OSO: "You know, after listening to you, it sounds like you are the kind of guy who would be interested in learning about other opportunities to get the hours and instrument ratings you need to realize your ultimate goal of working for one of the major airlines. Is that right?"

6. After the OSO/OSA has confirmed the existence of a need, the OSO/OSA will make an enabling statement requesting an appointment with the prospect.

EXAMPLE: "To reach your ultimate goal of flying for one of the major carriers, it sounds like it is going to take you at least five years and tens of thousands of dollars. If you qualify, the Marine Corps has guaranteed aviation programs which will enable you to not only attain the number of hours you need in about the same timeframe, but you may also have the opportunity to attain your multi-instrument rating without having to pay tens of thousands of dollars for it. In fact, the Marine Corps would be paying you to work toward achieving your goals. Additionally, the leadership experience, flight training, and networking you achieve as a Marine aviator will assist in setting you apart from your peers and can give you an advantage in the hiring process. I have some time this afternoon, would you like to meet and discuss these opportunities in detail?"

7. As with disinterest, the OSO/OSA will use MC3 to respond to "doubts it."

EXAMPLE:

Prospect: "I haven't heard about any of these opportunities in the Marine Corps in any of my classes or from any of my friends. This sounds too good to be true. What's the catch?"

OSO: "What do you mean?"

Prospect: "I can't believe aviation is guaranteed, or that it's that easy to be a pilot in the Marine Corps."

OSO: "You know Steve, I can understand how it's difficult to believe. It's not something you'll see in our commercials, but that's another reason for us to sit down and speak face-to-face. I assure you that when we get together I can provide you with some good information to help you make a better-informed decision about the path you want to pursue to achieve your goals. What do you think?"

Prospect: "OK, but I'm not going to sign anything today."

OSO: "Don't worry Steve, it doesn't work like that. It generally takes applicants a couple months to go through the application process for the aviation officer programs; that's why it's better for you and I to speak sooner rather than later. Would you like to meet at my office? Say three o'clock?"

8. As with disinterest and "doubts it," the OSO/OSA will use MC3 to respond to "misunderstands it."

EXAMPLE:

Prospect: "You know, that sounds good, but I heard that Marines don't have much time for any kind of a personal life."

OSO: "I understand why a personal life is important, what kinds of things do you think you wouldn't be able to do in the Marine Corps that you can do in civilian life?"

Prospect: "I like to hunt and fish a lot; I don't want to give that up."

OSO: "I like to hunt and fish too. Why are doing those things important to you?"

Prospect: "Hunting and fishing have always been a big part of my life. There's no way I'd be willing to give those up."

OSO: "Steve, I completely understand where you're coming from. This is another reason for us to sit down and talk face-to-face. Marines have a life outside the Marine Corps; most people don't understand how our free time works because they aren't Marines. We get nights and weekends off, and we get 30 days of paid vacation a year; we have a lot of personal time outside of work to enjoy the things that we like to do. In your case, you'd have plenty of time to do all the hunting and fishing you would want. If you would like, I can explain what a Marine's typical daily, weekly, and monthly schedule is like when we meet. Are you interested in sitting down today to learn more about how the Marines can help you achieve your goals?"

Prospect: "OK, how about three o'clock?"

OSO: "Sounds good."

9. After the prospect agrees to meet with the OSO/OSA, the OSO/OSA will engage the prospect to determine if he/she is basically qualified for the officer programs.

Example: "Steve, what I'd like to do now is ask you a couple questions to determine if you're basically qualified for the officer programs. This will save you some time so you don't get down here to our office today only to find out you're not qualified. Sound good?"

10. Screening a prospect on the phone. Screening over the phone is not as effective as screening in person due to the fact that the OSO/OSA is unable to read the prospects body language, etc. The OSO/OSA will use the Prospect Applicant Card to screen the prospective applicant, and re-screen the prospect at the appointment.

11. Confirm time, date, and location of the appointment. Ensure the prospect has the OSO/OSA's contact information in case he/she is running late, and ensure the prospect has the address to the appointment location. It can be a good idea to confirm the prospect's transportation, not all college students have access to a vehicle. If the prospect does not have access to a car or cannot get to the OSS easily, the OSO/OSA may want to consider moving the appointment time/date/location to the prospect's campus when the OSO/OSA and prospect can meet more easily.

12. OSOs and OSAs must constantly consider where the next prospect will come from. The OSO/OSA will ask the prospect if he/she is aware of anyone else who may be interested in learning more about the Marine Officer programs.

EXAMPLE: "Is there anyone else you know of who may be interested in learning more about the Marine Officer programs?"

13. Gain the prospect's commitment on the phone.

EXAMPLE:

OSO: "Alright Steve, let's quickly go over what we've talked about. We're going to meet at my office across from campus at 3:00 today, and you have your own transportation. Some of things that you can look forward to hearing about are how the Marine Corps can help you achieve your goal of flying for one of the major airlines, and how you can do that while having the personal time to do the things you enjoy like hunting and fishing. Steve, if you've got time, write down any questions or other things that you'd like to talk about when you get here today. In the meantime, I'll set aside some pamphlets and brochures for you to take with you today after we talk. Sound like a good plan?"

Prospect: "Sounds great".

OSO: "All right, it's been great talking to you and I'm looking forward to our meeting. See you this afternoon."

CHAPTER 12

How to Area Canvass (AC) Prospect and Conduct Presentations

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	12001	12-2
DEFINITION OF AN AC CONTACT	12002	12-2
PLANNING FOR AC PROSPECTING	12003	12-2
SCHEDULING AC PROSPECTING	12004	12-3
AC PROCEDURES AND TECHNIQUES	12005	12-4
CONDUCTING AC PROSPECTING	12006	12-5

CHAPTER 12

How to Area Canvass (AC) Prospect and Conduct Presentations

12001. GENERAL. As a recruiting activity, Area Canvassing includes conducting events such as Display Tables (DST), Campus Presentations (CMP), Marine Corps Flight Orientation Program (MCFOP) events, Area Canvassing [(CAN) walking around and talking to people], and Enhanced Area Canvassing (EAC) events. Due to the fact that the OST's effort directly affects the volume of contacts achieved, AC prospecting is an invaluable activity for the OST. Area Canvassing is the only recruiting activity that guarantees the OST face-to-face contact with mission-specific categories. The OST will plan for AC events and establish regular objectives to assist the OST in working toward mission accomplishment.

12002. DEFINITION OF AN AC CONTACT. An AC contact is a prospect, (who the OST has not previously contacted and is not obviously disqualified) the OSO/OSA meets face-to-face and obtains the prospects name, and sufficient contact information to conduct a follow-up, for the purpose of setting an appointment. For an OST to count a contact as an AC contact, the OSO/OSA must gain sufficient contact information to conduct a follow-up. The OSO/OSA will always attempt to obtain a prospect's name, phone number, and email address at a minimum. (As a reminder, when entering the contact's information in MCRIS-OSS, the OST will need the prospect's gender, race/ethnicity, school, and projected graduation year.)

12003. PLANNING FOR AC PROSPECTING. Area canvassing is time consuming; it's imperative that OST members plan AC activities effectively and utilize effective time management skills when conducting AC activities. The OST should always attempt to turn area canvassing into opportunities to conduct other OST business such as collecting applicant documents, conducting follow-up appointments, meeting with members of the OST's pool, and meeting with university officials.

1. Preparing for AC prospecting begins when the OST is developing the annual plan and does not end until the prospecting activity begins. After conducting the market analysis and setting objectives for each college and university in the OST's Area of Operations (AO), the OST must develop an effective visit schedule for each school. When developing a visit schedule for a university, OST's must consider the following:

a. When is the first day of the semester/last day of the semester? The beginning of each semester is always the busiest on campus; OSTs should plan to be on campus almost every day at the beginning of each semester.

b. What days are classes not in session? (Fall break, holidays, reading days, etc.)

c. When are finals scheduled? (Campus' are usually not very crowded around finals; the OST should plan to conduct other prospecting activities and processing at this time.)

d. What are the important events on campus with established dates? (e.g. career fairs, sporting events, new student orientations, etc.)

e. What dates does the OST have other planning considerations? (e.g. CGAP meetings, R&R training, conferences, etc.)

2. When the OST is planning AC prospecting on campus, the OSO/OSA must be familiar with the OST's AO. The OSO/OSA will need to review the annual plan's market analysis, the college profile sheets, and each school's website to plan an effective visit schedule.

3. It is important to note that Area Canvassing is not limited to college campuses; the opportunity to meet an AC contact always exists.

12004. SCHEDULING AC PROSPECTING. Scheduling AC prospecting is going to be slightly different at each school; however, there are some basic commonalities all OSTs should consider when scheduling AC prospecting.

1. The OST must know the key spots on campus to conduct prospecting activities. Some schools will have pre-determined locations the OST is authorized to set up a display table, others might allow table set-ups anywhere on campus (once again, this is where an effective college relations program can assist the OST). OST's can use candidates, students, and campus staff as resources to identify the most advantageous locations for the OST to prospect. If a university does not allow table displays at key locations such as the university center, gym, etc., the OST should consider conducting canvassing activities, putting up posters, handing out business cards, etc. in that area.

2. Display Tables. Colleges and universities often have predetermined locations groups/agencies are authorized to conduct table set-ups. OST's should first contact the school's career center when attempting to schedule table set-ups. Schools will sometimes charge non-school affiliated groups for setting up a table display on campus; the OST is often able to get around this charge by scheduling table set-ups through the university's career center. If a school charges a fee, the OST will work with RS Supply to coordinate payment. Some schools may require non-school affiliated groups/agencies to be sponsored by a school-affiliated club/organization to set up on campus. If a school requires sponsorship, the OST should consider establishing a Semper Fi Society with the candidates on campus; an additional option might be an NROTC unit. OSTs must be aware of each school's tabling policy; some colleges and universities are on a first come, first serve basis, and the OST might not be able to reserve a desired location if the reservation is not made in a timely manner.

3. Career Fairs. Most colleges and universities have transitioned to online career fair registration. The OST must establish an account, often times through the career center's webpage, to register for career fairs. When registering for career fairs, the OST will often times be required to enter a description of the Marine Corps, what types of positions we are "hiring for," etc. Most colleges and universities charge a fee, sometimes at a government/non-profit rate, for attending the career fair; the OST will need to work with RS Supply to coordinate payment.

4. Campus Presentations. Campus presentations include scheduling information sessions and giving presentations to a class, sports team, or other group/organization. When planning a presentation to a class, sports team, etc., the OST will obviously have to work through the appropriate instructor or coach. In addition to these opportunities, some schools provide opportunities for the OST to host an information session. For an information session, the OST will likely have to coordinate with the university's career center for a classroom and other required logistics. Often times, the

information sessions do not cost the OST any money and the university will publicize the information session through mass emails to the students.

5. Enhanced Area Canvassing. Enhanced Area Canvassing includes prospecting with the use of enhancements such as a pull-up bar, the RS EAC vehicle, or the District's Enhanced Marketing Vehicle (EMV). Who an OST will coordinate an EAC event with will usually depend on the type, and desired location, of the EAC event the OST is attempting to conduct. A standard pull-up challenge EAC event conducted during a regular school day might be coordinated through the career center or rec center (depending on the location), but a larger event conducted during a college sports game would likely be coordinated through the athletic department.

12005. AC PROCEDURES AND TECHNIQUES.

1. AC Procedures. The OST's goal while area canvassing is to pique a prospect's interest, obtain their contact information, and then move on to identify the next prospect. While area canvassing, the OSO/OSA must strike a balance between being courteous and looking for the next prospective applicant. Do not waste valuable time on an individual who is obviously not qualified for the officer programs. The OST will have better success at area canvassing when they profile individuals. The OSO/OSA must be cautious not to overlook a potential applicant because they do not fit a certain profile, but when approaching individuals, the OSO/OSA should be looking for indications and warning such as tattoos, piercings, height/weight, etc. When conducting area canvassing, the following are some basic procedures to guide you:

a. Initiate contact. The OSO/OSA should be outgoing, approachable, positive, confident, and professional. The OSO/OSA's mood will absolutely have a positive, or negative, effect on their approachability and their prospecting results.

b. Listen with purpose. Uncovering a prospect's needs and interests occurs continuously throughout conversation with a prospect. When people speak, they sometimes convey valuable information, which the OSO/OSA can use later to gain commitment.

c. Conduct basic screening. The extent of screening depends on the circumstances. For example, if a prospect is with a group of peers, most screening can wait until a later time. If it's just the OSO/OSA having a conversation with a prospect, the OSO/OSA will conduct an informal screening of the prospect.

d. Obtain the prospect's name, phone number, and e-mail address. The OST will need sufficient contact information to follow-up with the prospect; it's a good idea to get both the phone number and email address in case one is illegible later. (Remember, when entering the prospect's information in MCRISS-OSS as a contact for the day, the OST will need to enter, gender, race/ethnicity, school, and projected graduation date. It's a good idea for the OSO/OSA to add that information to the prospect's contact information after the prospect leaves the area.)

e. Request an appointment with the prospect. The OST will be able to conduct more effective screening, and interview the prospect appropriately, in a more conducive environment. When asking to meet with the prospect, give the

prospect a choice. For example, "Would you like to meet at my office or would you like to meet on campus?"

f. End the contact with the prospect. If the prospect agrees to meet with the OSO/OSA, the OSO/OSA will confirm the time, date, and location of the meeting with the contact. If the prospect does not agree to meet with the OSO/OSA, the OSO/OSA will give the prospect basic information and leave the prospect with a positive feeling. Regardless of the outcome with the prospect, the OSO/OSA will inform the prospect where they can find more information about the officer programs, and will always ask if the prospect knows of anyone else who might be interested in learning about the Marine officer programs.

g. Record Results. If a prospect gives the OSO/OSA his/her contact information, as soon as practical, but not later than the end of the week, the OST will enter the prospect in MCRISS-OSS as an AC contact and schedule a follow-up.

h. Analyze Results. The OSO/OSA should do a brief self-evaluation of the event. What was done well? What could have been done better? Was the objective accomplished? If not, why?

2. AC Techniques. OSOs and OSAs must work on developing the right approach and must force themselves to talk to people while area canvassing. What is the right approach or technique for area canvassing? This is largely based on the OSO/OSAs personality. The following are a few points an OSO/OSA may consider:

a. Be outgoing. Introduce yourself, shake hands, tell them who you are and what you do. In simple terms, be informal, personable, and professional.

b. Seek some common points of interest that you can discuss with the prospect (e.g. interests, goals, career paths, degree tracks, etc.). Attempt to weave these common interests into the possibility that the prospect may find them in the Marine Corps.

c. When you make contact with groups while area canvassing, try to identify the leader of the group and appeal to that person. Hand out business cards to the entire group.

d. Remember, the goal of area canvassing is to get a prospect's contact information and set an appointment, not to conduct on-the-spot interviews. Give the prospect just enough information to gain interest and then set an appointment to follow-up.

e. Regardless of the outcome of an encounter with a prospect, each prospective applicant should leave the encounter with a positive impression of the Marine Corps, and a way of learning more about the Marine Corps in the future. For example, give the individual a business card, collateral material, or reference marines.com.

12006. CONDUCTING AC PROSPECTING.

1. Display Tables. The OST's primary recruiting tool on campus is the display table. (It's sometimes referred to as the OSO's "fruit stand.") OST's will consider the following when conducting a table display:

a. Location, location, location. If possible, ensure the table is in a location that gets the maximum amount of traffic possible.

b. Consider using videos in addition to standard MCRC collateral material and incentive items.

c. Inform the candidates the OST will be on campus and have them stop by.

d. Advertise the visit (prior to, during, and post visit if appropriate).

e. Appropriate uniform.

f. Be prepared for the visit (e.g. collateral material, incentive items, be on time, etc.).

2. Campus Presentations. OSTs conduct these events to make initial contact with prospects through a general audience. OSTs can use presentations to publicize the Marine Corps as well as the officer candidate programs. Ideas for campus presentations include aviation presentations, leadership presentations to fraternities and sorority's, and CFT/leadership presentations to sports teams. OST's will consider the following when conducting presentations:

a. What is the audience? And, what is appropriate for the audience?

b. Utilize an appropriate proof source.

c. Be professional.

d. Be prepared.

e. Do not use acronyms.

f. Advertise the presentation if appropriate.

g. Have a plan to work the crowd.

3. EAC Events. The goal of conducting EAC events is to generate a large volume of leads. OST's should attempt to conduct EAC events at events that draw large crowds; events such as college sporting events, Spartan races, Tough Mudder's, etc., but a Pull-up Challenge at a campus is also considered an EAC event. When conducting EAC events, OSTs will consider the following:

a. Conduct appropriate prior planning.

b. Is additional support from the local RSS or Command Group necessary?

c. Can the RS MPA support with advertising, iPads for lead generation, collateral material, etc.?

d. Cost of the event.

4. Marine Corps Flight Orientation Program (MCFOP). MCFOP is a tool the OST can use to generate interest and produce aviation applicant leads through presentations or EAC events. The District AAOP is the MCFOP manager; OSTs will discuss MCFOP ideas with him/her. Potential MCFOP opportunities could include OST involvement at local air shows, presentations at local aviation

schools, presentations to flying clubs, static displays (AAOP can attempt to coordinate static displays), use of simulators, etc. When conducting MCFOP, OST's will consider:

- a. Advertising (pre, during, and post-event).
- b. Utilize MCFOP as a tool to build relationships with campus staff.
- c. Individuals will complete a Hold Harmless Agreement (HHA) prior to participating in any event which aircraft are utilized.
- d. Have a plan to work the crowd.

CHAPTER 13

How to Use the Officer Priority Prospect Card (OPPC) Program

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	13001	13-2
THE ADVERTISING PORTAL	13002	13-2
DEFINITIONS	13003	13-2
HOW TO WORK AN OPPC LEAD	13004	13-3

CHAPTER 13

How to Use the Officer Priority Prospect Card (OPPC) Program

13001. GENERAL. An OPPC is generated as a result of an individual's request for additional information about the Marine Corps from media advertising or the Direct Mail program. OPPCs are distributed daily through the electronic Priority Prospect Card (ePPC) system on the MCRC Advertising Portal (AdPortal). An OPPC is generally referred to as a "hot lead" because an individual has actively sought information about the Marine Corps; for this reason, OSTs must have a plan to actively work OPPCs on a daily basis.

13002. THE ADVERTISING PORTAL. The OSO/OSA will request an account for accessing the AdPortal through the RS Operations Section. In addition to functioning as the location for managing OPPCs, the AdPortal enables the OST to send mass emails and search for officer collateral material to order through the RS Marketing and Public Affairs (MPA) Marine.

13003. DEFINITIONS. To allow for analysis of program effectiveness and determination of training needs, the OST must understand and apply the below definitions when working the OPPC program.

1. Good Lead. Requirements for a lead to be marked as a "good lead" include:

a. The OST is able to contact the lead at the provided phone number or email address.

b. The lead (or prospect) must meet officer program requirements, per MCRCO 1100.2_, Officer Commissioning Manual, in the following categories:

(1) Age.

(2) Academic testing (SAT, ACT, or ASVAB).

(3) Education (i.e. graduated from a regionally or nationally accredited university or is full-time enrolled).

(4) GPA.

2. Bad Lead. The OST will mark a lead a "bad lead" when the prospect does not meet all of the above requirements to be considered a good lead.

3. Workable. The OST will mark a lead as "workable," if the prospect has a reasonable chance of applying for an officer program within the next year.

4. Not Workable. The OST will mark a lead as "not workable" when the prospect meets the age and education requirements to apply for an officer program, but cannot apply due to being physically, medically, or morally unqualified.

5. Examples.

1. *Bob requested information on marines.com. The OSO calls Bob and he answers the phone. After screening Bob, the OSO identifies Bob is 26 years old, scored a 23 on the ACT, and graduated from NC State with a 2.9 CUM GPA. Bob is in decent physical condition and meets all other program*

requirements with the exception of having admitted to smoking marijuana five times in high school.

Good Lead/Bad Lead; Workable/Not Workable? Bob is a good lead, and is workable. Despite the admitted marijuana use, Bob would likely receive a waiver and has a reasonable chance of applying for the OCC program.

2. The OSO attempts to call, text, and email Susan multiple times over a 10 day period but is unable to reach her.

Good Lead/Bad Lead; Workable/Not Workable? Susan is a bad lead, and not workable because the OSO was not able to contact Susan to screen her for the officer programs.

3. Caleb filled out a request for information at the RS' Pull Up Challenge at the local state fair. When the OSO reaches Caleb, Caleb informs the OSO that he only filled out the information because he wanted to win a T-shirt by doing 20 pull ups. After exploring and enabling a little bit, the OSO is able to overcome a little bit of Caleb's disinterest and identifies that Caleb is 19 years old, scored a 21 on the ACT, and is currently enrolled full-time as a freshman at the University of Florida; his first semester GPA was 3.5. Caleb is in excellent physical condition and meets all other program requirements.

Good Lead/Bad Lead; Workable/Not Workable? Caleb is a bad lead, but is workable. Caleb is a bad lead because he does not currently meet the ACT requirement of 22; however, his score of 21, combined with his high GPA, indicates that Caleb has a reasonable chance of attaining a 74 on the ASVAB to be qualified to apply for the PLC program.

4. Sarah received an email targeting law students the OSO sent out using the AdPortal. She clicked on a link to Marines.com and requested more information about the Marine Judge Advocate program. After reaching Sarah over the phone, the OSO identifies that Sarah is about to turn 28, scored a 28 on the ACT, 162 on the LSAT, and is graduating from the University of Wyoming Law School next month with a 3.9 CUM GPA. After further screening, the OSO learns that Sarah has no disqualifying medical, physical, or moral conditions, but she has never worked out a day in her life; when the OSO asked her when the last time she worked out was, she laughed and said "when she had to run a mile for gym class in high school."

Good Lead/Bad Lead; Workable/Not Workable? Sarah is a good lead, but is not workable. Sarah meets all the requirements to be considered a good lead, and she does not have any disqualifying conditions; however, when she turns 28, she will need an age waiver, and she does not appear to have a reasonable chance of getting one within the next year.

13004. HOW TO WORK AN OPPC LEAD. The OST will systematically work a lead utilizing the process below. For details regarding how to use the OPPC application in the AdPortal, refer to the AdPortal's User Manual.

1. The National Fulfillment Center processes requests for information about the Marine Corps, and filters lead information to the appropriate OST or RSS based on the individual's responses to questions about their education status and where they live. Occasionally, a lead will end up being sent to the wrong OST due to the individual's responses to their education status. If a lead is sent to the wrong OST in error, the OSO/OSA will contact the appropriate OST

and relay the lead's information. If possible, the OST will attempt to reassign the lead in the OPPC program application.

2. When the Fulfillment Center filters leads to the OST, each lead is assigned a date that the lead must be completed and returned to the Fulfillment Center by with notes on the lead's status; OST's must return the lead by the lead's return date.

3. Every day, the OST will make it a priority to check the OPPC account for new leads. If there are leads under the "To Be Contacted" tab in the OPPC application, the OSO/OSA will review the information on the lead and attempt to contact the prospect.

4. The OSO/OSA will first attempt to call the prospect. If the prospect does not answer the OSO/OSA's phone call, the OSO/OSA will then attempt a secondary method of contact such as texting or emailing.

5. The OSO/OSA will make a minimum of five attempts to reach every lead until the lead must be "returned." When attempting contact, the OST will attempt to call, text, and email the prospect. OST's will also vary the times of day between morning, afternoon, evening, and weekends when they are attempting to contact prospects.

6. After contacting the lead, or if unable to contact the prospect by the lead's "return date," the OSO/OSA will annotate the results of the attempted contact on the lead card in the OPPC application. The OSO/OSA must annotate whether the lead was a "good lead" or "bad lead," "workable" or "not workable," and enter notes for all "not workable" leads.

7. If the OSO/OSA determines a lead to be "not workable" for an officer program, but the lead might meet current enlistment requirements, the OST will refer the lead to the RS Operations Section or the appropriate RSS.

8. After an OST contacts a lead, the OST will enter the prospect in MCRISS-OSS as a contact based on the definition of a contact in Chapter 5.

CHAPTER 14

How to Use Physical and Electronic Mail-Outs

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	14001	14-2
OBTAINING LISTS FOR CONDCUTING MAIL-OUTS	14002	14-2
MCRC DIRECT MAIL	14003	14-2
TRIGGER MAIL	14004	14-3
LOCAL MAIL	14005	14-3
EMAIL	14006	14-3

CHAPTER 14

How to Use Physical and Electronic Mail-Outs

14001. GENERAL. The Marine Corps reaches several important markets each year through a system of mail-outs. Mail-outs include MCRC direct mail, trigger mail-outs, local mail-outs produced at the OSS level, and emails generated at the OSS level.

1. MCRC direct mail consists of pre-printed stock that MCRC sends to individuals at an OSO's request.
2. A trigger mail-out is a targeted mail-out the District will send out at the OSO's request.
3. A local mail-out is mail the OSS produces and distributes to initiate contact with prospective applicants.
4. The OSO can use mass-email campaigns through the Advertising Portal (AdPortal) to reach prospective applicants.

14002. OBTAINING LISTS FOR CONDUCTING MAIL-OUTS.

1. The first step in being able to conduct any type of mail-out is to obtain a list of students from the colleges and universities. The process for obtaining school lists is a key section of the college relations program; (Refer to Chapter 8 of this Guidebook for more information on the process for obtaining a college or university list.)
2. Colleges and universities will often provide the OSO with a school list in Microsoft Excel format. A school list in excel format enables the OST to sort and filter the list by age, gender, race/ethnicity (if provided), major, class, etc. If a college or university is unable to provide the school's list in excel format, the OSO will ask the school to filter the data to meet the OST's needs.
3. OSOs will update procedures and school points of contact for obtaining school lists on the college profile sheets.
4. OSOs must familiarize themselves with the policies associated with the limitations of use and protection of Personally Identifiable Information (PII).
5. In the event an OSO is unable to obtain a college or university list from a public institution, the OSO will notify their chain of command. (Private institutions are not bound by the Solomon Amendment because they do not receive Federal funding.)

14003. MCRC DIRECT MAIL. The MCRC direct mail program is one of the best lead generating programs MCRC utilizes. The information MCRC mails out refers prospects to marines.com and generates OPPCs when the prospect requests more information. Following a request for information, MCRC sends the prospect more detailed information about the Marine Corps with an incentive item. OST's can use MCRC direct mail by providing a list of names and addresses to the RS MPA who will route the request to MCRC. OSO's can view direct mail samples on the MCRC AdPortal.

14004. TRIGGER MAIL. The OSO drives the OST's use of trigger mail through the RS MPA and the District advertising representative. Trigger mail-outs should be designed to target a specific market and refer prospects to marines.com and the local OSS to generate leads. The OSO will work with the RS MPA and the District advertising representative to design trigger mail templates. Once the template is designed, OSOs will provide the RS MPA with a list of names and addresses for the mail-out.

14005. LOCAL MAIL. The OSO drives the OST's use of local mail. If the OST possesses a postage stamp machine, the OST can produce its own mail-outs. Additional options for utilizing local mail include stuffing campus mailboxes and placing flyers in bags at the campus bookstore at the beginning of the semester. If an OSO decides to utilize local mail-outs, the OSO must work with the RS MPA and/or the District advertising representative to ensure the mail-out is branded in accordance with MCRC guidelines and is designed to generate leads by referring prospects to marines.com or the OSS.

14006. EMAIL. The OSO drives the OST's use of mass-email campaigns through the AdPortal. The AdPortal has pre-generated and targeted emails the OSO can send to a list of students for which the OSO has obtained emails. In addition to the pre-generated emails, the AdPortal provides OSOs with the opportunity to alter emails and send out OSO-generated information. As with all other mail-outs, it is imperative the OSO ensure all emails are checked for accuracy of information, spelling, grammar, and are in keeping with the Marine Corps' current advertising guidelines. All emails the OSO sends through the AdPortal will automatically possess the OSO's contact information and links to marines.com for lead generation.

1. When sending emails through the AdPortal, OSO's will need to consider the college or university's SPAM filter. It may be necessary for the OSO to send emails in text format vice as an HTML.

2. The email generator in the AdPortal tracks each mail-out's status for analyzation purposes. For example, the email generator will tell the OSO how many emails were sent, how many were opened, how many people clicked on the link in the email, etc. The OSO should use this information to plan for adjustments to future emails as necessary. If an OSO's emails are not generating the desired amount of responses, OSOs should consider sending the email out as text vice HTML, changing the subject line of the email, timing of the email, etc.

3. When considering sending out mass-emails, OSOs must be aware of the CAN-SPAM Act. The CAN-SPAM Act requires that all e-mails be clearly and conspicuously displayed with a return e-mail address, confirmed internet-based opt-out mechanism, and identify that the message is an advertisement or solicitation. Recipients must be able to opt-out of receiving future emails within 10 business days, and must be able to opt-back in with an affirmative consent only. If the OSO uses the OSO email generator in the AdPortal, all emails will automatically be in compliance with the CAN-SPAM Act.

CHAPTER 15

How to Work With a Selected Marine Corps Reserve (SMCR) Unit

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	15001	15-2
OST INTERACTION WITH THE SMCR UNIT	15002	15-2
WORKING WITH THE SMCR UNIT	15003	15-2
RESERVE UNIT PRESENTATIONS	15004	15-3
WORKING WITH RESERVE AFFILIATES	15005	15-4

CHAPTER 15

How to Work With a Selected Marine Corps Reserve (SMCR) Unit

15001. GENERAL. An SMCR unit in the OST's AO can be an immense benefit to the OST. Many of the Sergeant's and below at SMCR units are full-time students enrolled in local colleges/universities. Additionally, the unit can often support the OST's pool program through the use of corpsmen, an obstacle course, and potentially, other logistical support. If the OST maintains a positive working relationship with SMCR staff (active and reserve), the unit can provide the OST with numerous contracts and support for OSS activities.

15002. OST INTERACTION WITH THE SMCR. Each OSO will need to develop an effective working relationship with the local SMCR units. The list below describes some basic interactions each OSO will likely have with local SMCR staff.

1. Applicant medical processing. When an OST is processing a Marine Reservist, the OST can reach out directly to the SMCR medical staff to get copies of the reservist's medical record. The applicant will likely have to sign a release for the unit to give specific medical documents to the OST, but this practice can save the OST valuable processing time. (This includes copies of entrance physicals and annual Physical Health Assessments.)

2. Personal Information Questionnaires (PIQs). Per MCRCO 1100.2, the Officer Commissioning Manual, the OST is required to obtain a PIQ from the Marine's chain of command for each drilling reserve applicant. A positive relationship with the Inspector & Instructor (I&I) can assist the OST in obtaining PIQs in a timely manner.

3. Medical support for pool functions. When an OST conducts high-risk training such as hikes, the obstacle course, etc., the OST can often reach out to the SMCR unit medical staff for support. To assist in facilitating support, the OSO can write a Letter of Appreciation (LOA) for a corpsman volunteering their time on the weekend. The LOA will go into the corpsman's record and will contribute points toward the corpsman's future promotions.

4. Training and logistical support. Most SMCR units will have an obstacle course and facilities the OST can use for pool functions. Additionally, the OST can attempt to use the unit's rifles and gear for hikes, a pre-OCS weekend, or any other function the OST is hosting.

5. Reserve Unit List. The OSO will regularly give presentations at the local reserve units; however, not all reservists are always present. The OSO can work with unit's S-1 to obtain a copy of the names and phone numbers of all of the Sergeant's and below in the unit; the list will provide the OST with more targeted TC prospecting opportunities.

15003. WORKING WITH THE SMCR UNIT. The primary purpose of establishing a positive relationship with the SMCR unit is to obtain referrals and gain the unit's support for OST functions whenever possible. The guidelines below are some ideas for generating referrals, and some best-practice Tactics, Techniques, and Procedures (TTPs) for working with the SMCR unit.

1. The following actions can assist the OST in generating SMCR referrals:

a. Visit the unit as often as possible (A minimum of twice per year: once in the early fall when school starts, and once in the late spring when school is ending. It is also recommended the OST follow-up with the unit in the winter when second semester is beginning. Reservists often attempt to time their boot camp, SOI/MCT, and MOS training to facilitate beginning college as soon as possible.)

b. Obtain a list of all members at the unit and conduct targeted prospecting for all college students and graduates.

c. Give presentations to all members of the unit on a regular basis; new reservists arrive at the unit regularly.

d. Keep the unit informed about the recruiting mission and the specific areas in which their assistance is needed.

e. The OST can attempt to get involved with the local unit to facilitate a positive working relationship in a number of ways. Opportunities include attending drill weekend, offer support in instructing class, assisting with participation in Toys For Tots, etc.

2. The following actions are some best-practice TTPs for working with the SMCR. Some of the TTPs below are required.

a. Inform the SMCR unit staff of selection results and ensure they are aware of candidates' training schedules.

b. When a reservist is preparing to ship to OCS, the OST will forward a copy of the Marine's orders to the unit's S-1 for appropriate entries on the unit diary.

c. Request a unit deployment and drill schedule from the I&I for OST planning purposes.

d. Request support for static displays, training support, and logistical support as necessary.

15004. RESERVE UNIT PRESENTATIONS. SMCR units are required to grant the OSO access to SMCR personnel to give a presentation to all Marines. The OSO should never take for granted that every Marine in the unit is aware of, or understands, the opportunities to become an officer.

1. Preparation. During annual planning, the OSO will contact the SMCR unit for the unit's drill schedule and list of Marines. The OSO will work with the I&I to schedule presentations as required. It is highly recommended that OSOs follow-up with the I&I regarding scheduled presentations. Unit's often have a very busy schedule and the OSO is not normally at the forefront of the I&I's mind.

a. The OSO will consider the following for the presentation:

(1) Remember, you will be dealing with Marines again, not college students; adjust presentations accordingly.

(2) Unit's time restraints.

- (3) Use of current candidates as proof sources.
- (4) Uniform.
- (5) Pre-visit advertising with the I&I.
- (6) Availability of a location for conducting interviews.
- (7) Location of the presentation.

3. SMCR Presentation Techniques.

a. Inform the Marines of the different programs available and illustrate the benefits of dual enrollment in the SMCR and PLC program.

b. Introduce the SMCR Marines in the PLC program to their peers.

15004. WORKING WITH RESERVE AFFILIATES.

1. Often times, an area with a Reserve unit will also have additional Reserve affiliate organizations such as Marine Corps Reserve Officers Association (MCROA), a Mobilization Training Unit (MTU), etc. These organizations may have contacts to assist recruiting in the local community.

2. The RS XO or CO will have a list of the Reserve Support Officers (RSO) living in the OSS' area. These Reserve Marine Officers may be prominent and influential members of the local community and can assist the OSO in various prospecting activities ranging from display tables to CFTs to leadership presentations, etc. The RSO can be a valuable resource for the OSO when utilized effectively.

CHAPTER 16

How to Maintain an Effective Pool Program

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	16001	16-2
DEFINITIONS	16002	16-2
PURPOSE	16003	16-2
THE OST'S ROLE IN THE POOL PROGRAM	16004	16-3
POOL FUNCTIONS	16005	16-4
POOL MANAGEMENT TOOLS	16006	16-7
WELCOME ABOARD BRIEFING	16007	16-8
PLC POOL SUPPLEMENTAL PROGRAMS	16008	16-9
PLC LAW POOL PROGRAM	16009	16-9

CHAPTER 16

How to Maintain an Effective Pool Program

16001. GENERAL. OSOs will establish and maintain a pool program designed to motivate and prepare candidates for OCS, generate referrals, and ultimately commission second lieutenants. A secondary, but important, purpose is to ensure that newly commissioned second lieutenants receive the mentorship necessary to successfully prepare themselves for follow-on training at The Basic School (TBS). Due to the amount of time a candidate may spend in the pool (up to seven years), the pool program can have a significant impact the poolee's development. The most important element relating to the success of the program is the OSO's "hands-on" execution of the pool program. The OSO's personal involvement with each applicant/candidate will directly impact their success at OCS and TBS.

16002. DEFINITIONS. The definitions below are intended to clear up any confusion which may exist in regard to the terms guest, applicant, candidate, and poolee.

1. Guest. A guest is an individual who attends a pool function and has not committed to applying for an officer program; this term specifically applies to Hold Harmless Agreements addressed in paragraph 16005.

2. Applicant. An applicant is an individual who has committed to applying for the officer programs, but has not yet contracted for a selection board.

3. Candidate. A candidate is an individual who has contracted for a selection board. The OST will refer to individuals as candidates from the time they contract for a selection board until they receive their commission.

4. Poolee. An individual is a poolee after they sign their DD4 (Enlistment Document) and take the oath of enlistment. Lieutenants awaiting TBS are members of the pool; therefore, the OSO will occasionally see lieutenants referred to as a poolee.

16003. PURPOSE. The purpose of the pool program is to motivate and prepare candidates for OCS, generate referrals, commission second lieutenants by reducing attrition, and prepare second lieutenants for TBS.

1. Motivation and Preparation for OCS. The OSO is directly responsible for each candidate's mental and physical preparation. OSOs must develop a physically and mentally challenging pool program that focuses on preparing candidates for the rigors of OCS. OSOs are encouraged to develop innovative training plans to keep candidates engaged and motivated.

2. Generate Referrals. An effective pool referral program will greatly contribute to the success of the OST. By requiring poolees to provide the OST with referrals, the OST can efficiently and effectively reach countless more prospects. To assist in developing a poolee referral system, it is strongly recommended the OST implement a reward system for poolee referrals. Poolees can assist the OST through direct referrals, as well as through indirect support to the OST. Ways in which a poolee can contribute to the OST include:

a. Providing names and phone numbers of friends and classmates they think might be interested in the officer programs.

- b. Assisting the OST in developing campus relations.
- c. Assisting the OST in hanging posters, stuffing mailboxes, and passing out flyers.
- d. Assisting the OST during campus visits for display tables and EAC events.
- e. Bringing friends to the OSS and pool functions.

3. Reduce Attrition. OSTs will reduce attrition throughout the officer procurement process (i.e. prior to shipping, while at OCS, and after OCS but prior to commissioning) with the implementation of an engaging, physically, and mentally demanding pool program. A physically and mentally demanding pool program will maintain poolee interest in the program and significantly impact each poolee's ability to complete OCS.

4. Prepare second lieutenants for TBS. An OSO must keep second lieutenants engaged in the OST's pool program. In addition to contributing to the pool program by serving as proof sources and assisting in the training and development of candidates for OCS, the OSO is responsible for preparing the lieutenant for TBS.

16004. THE OST'S ROLE IN THE POOL PROGRAM. To accomplish the objectives (purpose) of the pool program, OSOs will consider the following directed-actions and guidelines for the management of a successful pool program:

1. OSTs will maintain regular contact with all poolees regardless of their dispersion throughout the AO and their status in the program (i.e. applicant, candidate, lieutenant, etc.). OSTs will attempt to maintain contact with each poolee once per week and face-to-face if possible.

2. OST's will begin each poolee's military education process by ensuring their education is focused toward the appropriate level. (For example, it does not do an applicant or a once-trained candidate any good to be focusing on TBS preparation when they still need to complete OCS.)

3. OSTs will organize and conduct group events to build camaraderie while physically and mentally challenging the poolees.

4. OSTs will inform poolees of their role in the OST recruiting mission and how they contribute to recruiting the best-qualified individuals.

5. OSTs will brief the poolees about the purpose, incentives, and scheduled events for the pool program. When developing a pool functions schedule, OSOs will develop a purposeful and varied training schedule aimed accomplishing the objectives (purpose) of the pool program.

6. OSTs will recognize top performers in training and recruiting related efforts.

7. OSTs will establish and maintain a relationship with the poolee's family and keep them informed about the pool program as appropriate. (This could include posting photos of the OST's pool functions, candidates at OCS, commissioning's, etc.; it will also include ensuring families are aware of the OCS graduation schedule of events, etc.)

8. OSTs will collect transcripts and Academic Certification Forms (ACFs) upon the completion of each semester to verify each poolee's continued progress and eligibility for the program.

9. OSOs will establish and maintain contact with each candidate at OCS.

10. In the event a poolee moves out of the OSS' AO, the OSO will conduct a proper transfer of the poolee by notifying the receiving OSO, and requesting the district process a transfer request for the poolee's MCRIS record. Cases in which the OSO might transfer a poolee include:

a. A candidate transfers colleges or universities.

b. A lieutenant completes college and moves out of the OSS' AO while awaiting orders to TBS.

11. Prepare fully-trained PLC candidates for commissioning by assisting with uniform fitting/preparation, and monitoring physical, medical, and mental qualifications for commissioning.

16005. POOL FUNCTIONS. OSTs will conduct monthly pool functions for all poolees. When developing the OST's pool function schedule as a portion of the OST's annual plan, the OSO should take into consideration scheduled events such as each school's academic calendar and holiday schedule; this will prevent the OSO from scheduling pool functions immediately before finals, after spring break, etc. When developing the pool functions schedule, OSOs will consider the following:

1. Common actions required for all pool functions, physical training, scheduled events with applicants/potential applicants, etc.

a. OSOs must abide by the regulations established in MCRCO 1100.2, Officer Commissioning Manual, by the RS, District, and current MCRC FROST Calls. For example, all participants (applicant, candidate, lieutenant, and guests) must complete a Hold-Harmless Agreement in accordance with current FROST Calls. OSOs can reference the current MCRC FROST Calls on the MCRC SharePoint site.

b. OSOs must abide by basic Marine Corps regulations such as conducting Operational Risk Management (ORM), having a corpsman (or certified EMT if appropriate), and safety vehicle onsite if required (i.e. the obstacle course, hike, etc.).

2. Required pool functions.

a. Pre-OCS Training Event. Some districts conduct a combined district pre-OCS event. If a district does not conduct a pre-OCS training event, the OST is required to conduct their own event. Pre-OCS training events are typically held in April prior to summer shipping; depending on the number of candidates an OSS/RS is shipping to OCS in the fall and winter, an OSS/RS will determine the need for additional pre-OCS training events throughout the year. When planning a Pre-OCS Training Event, OSOs will plan to replicate the physical and mental stressors of OCS as much as possible. OSOs will also attempt to incorporate as many poolees as possible, even if they're not selected to ship to OCS, to provide training to the applicant and facilitate the OST's evaluation of the applicant for future selection.

b. Warrior's Picnic. With the support of RS funds, each OST will conduct a Warrior's Picnic at the beginning of the fall semester. The intent of the Warrior's Picnic should be to get the pool together to eat, socialize, and talk about each candidate's individual experiences at OCS the previous summer. In addition to contributing to developing camaraderie, the Warrior's Picnic will assist in preparing and alleviating the fears and concerns of new poolees.

3. Suggestions for other monthly pool functions. Remember, functions should primarily focus on OCS preparation. When providing instruction on material such as five-paragraph order, tactical control measures, land navigation, etc., remember to focus on the OCS-level material. The list below includes several examples of potential monthly pool functions.

- a. Fire-team formations, Hand & Arm signals, tactical control measures
- b. Five-paragraph order
- c. Land navigation
- d. Drill (consider the RS SgtMaj for support)
- e. Weapons handling (Consider local reserve units for support, or NROTC units for rubber rifles. When using weapons or rubber rifles, ensure to communicate with local authorities as required.)
- f. Hikes
- g. Obstacle Course
- g. Marine Corps birthday celebration
- h. Trips to military exhibits, shows, or museums
- i. Small Unit Leadership Evaluation (SULE) training

4. High-Risk Pool Functions. The following are considered high-risk pool functions and require an LOI, ORM, and MCD CO authorization (via the RS CO).

- a. Indoor rock climbing
- b. Rappelling (must be conducted aboard a military installation)
- c. Paintball (must be conducted aboard a military installation)
- d. Confidence courses

5. Prohibited Pool Functions.

- a. Bungee jumping
- b. Hang gliding
- c. Parachuting
- d. Outdoor rock or ice climbing

- e. Running in "rubberized" sweat suits
- f. Live-fire training

6. Pool Function Exception-to-Policy (ETP) Waivers. The Commanding General, Marine Corps Recruiting Command, will entertain exception to policy waivers for the conduct of pool functions on a case-by-case basis. OSOs will submit waiver requests through the chain of command to the Commanding General, MCRC (Attn: AC/S G-3). Waiver requests will clearly demonstrate that the conduct of the pool function is in the best interest of the command, will serve to better prepare a candidate for the training they will receive at OCS, will not endanger the safety of any candidate, and that all common sense safety precautions have been anticipated and planned for by the requesting command. At a minimum, waiver requests will address:

- a. OIC/RSO (Range Safety Officer)
- b. Safety vehicles
- c. Closest medical facility
- d. Corpsman, or corpsman equivalent, support
- e. Each poolee (parent if poolee is under 18) will sign a Hold-Harmless Agreement

f. This guidebook cannot address all possible factors which might be included in an ETP waiver for pool functions; OSO's must use common sense. OSOs will use their experiences in the operating forces and MCO 3500.27_, Operational Risk Management (ORM) as a guide. What issues would your CO want you to address? For example:

(1) Weapons Firing. Requests to conduct M-16 rifle or 9mm pistol firing at a pool function must include the following:

- (a) An ORM in accordance with MCO 3500.27_.
- (b) Name of RSO and OIC.
- (c) The location of the range and a physical description of the range. (Firing points must be physically isolated from each other. Ranges must be certified for the caliber of weapon to be fired.)
- (d) The fact that each participant/parent will sign a Hold Harmless Agreement.
- (e) The fact that there will be a minimum of one safety NCO/SNCO at each firing point.
- (f) Participants will be rotated through the weapons and not weapons through the participants. Weapons will not leave the firing points.
- (g) The fact that each participant will receive a weapons handling class and a range safety class prior to firing.
- (h) The fact that rounds will be counted out to each participant.

(i) The organization that will provide weapons, when the weapons last underwent a Limited Technical Inspection (LTI). (If the weapons are provided by another service, the individual who is responsible for conducting the LTI must possess the same qualifications as a USMC 2111 armorer.)

(j) The location of the nearest hospital, to include distance from the range.

(k) The fact that a safety vehicle will be present.

(l) The fact that a corpsman will be present. If another military service or a civilian Emergency Medical Technician (EMT) will provide medical support, a statement must be included that the individual possesses the same level of medical training as a U.S. Navy Corpsman, and where the training took place.

7. Physical Conditioning Training. When developing the pool functions schedule and the pool program, OSOs should not plan to conduct a PFT at every pool function. Additionally, OSOs need to develop a pool function plan which maintains poolee motivation and contributes to each poolee's mental preparation for the rigors of OCS. For these reasons, monthly pool functions need to include training and events which are not solely PT-based. To supplement monthly pool functions, OSOs will implement a regular PT program. To be selection board-eligible, and to induct into training at OCS, candidates must run a minimum of a 225 PFT and meet the OCS minimums in each category.

	Male	Female
Category	Minimum	Minimum
Run Time (3-mile)	24:00	27:00
Pull up/Flexed Arm Hang	8 Pull ups	50 seconds*
Crunches	70	70

*Ability for females to do pull ups vice the flexed arm hang is dependent on the current CO of OCS.

16006. POOL MANAGEMENT TOOLS. The OST has a variety of tools which it can use to assist in managing the pool program.

1. Candidate Pool Card. After the applicant signs the DD4, Enlistment Document, the OST will take the necessary steps to contract the applicant in MCRISS-OS. Once the applicant is contracted in MCRISS-OS, the system creates a Pool Card for the candidate in MCRISS-OSS. After the applicant contracts, the OST will no longer use the applicant's PAC in MCRISS-OSS, the OST will begin using the candidate's pool card in MCRISS-OSS. The Pool Card is located in the Pool Board Module of MCRISS-OSS. The Pool Card is a tracking tool for the OST and contains much of the same personal and background information about the poolee. Similar to a PAC, a Pool Card requires "action dates" just as the PACs do. The candidate pool card contains the following information and requires OST updates to maintain the information:

a. Candidate's personal information (e.g. phone number, email address, and current address) and program action dates.

b. Scheduled dates for all program requirements [e.g. annual certification due date, BUMED due date (if necessary), pre-ship brief date, ship date, commissioning date, RFA due date, FAP/MCTAP tracking, etc.].

c. PFT results, current academic status, pool function attendance, etc.

d. Any remarks required to maintain a solid understanding of this particular individual.

2. Pool Log. The Pool Log is a running list of all the poolees in the OST's pool program. The Pool Log will include all contracted candidates, once-trained, and fully-trained candidates, and lieutenants awaiting TBS. The Pool Log is essentially a list of every individual the OST should expect to be at a pool function (plus guests and NWAs).

3. Monthly Pool Function Roster and After Action Reports (AAR). To assist in tracking training and maintaining accountability of poolees, the OST will maintain pool function rosters for each monthly pool function. After large training events such as the Pre-OCS Training Event, a Hike, Obstacle Course, etc., the OSO will conduct an AAR to capture the lessons learned for the next time the OST conducts similar training.

16007. WELCOME ABOARD BRIEFING. The OSO conducts the initial Welcome Aboard Briefing after the OST declares the applicant an NWA. The OSO should use the Welcome Aboard to strengthen rapport with the applicant, and provide guidance and expectations; the Welcome Aboard begins the applicant's education process in the pool. Each OST will develop their own Welcome Aboard package to give to new applicants. The Welcome Aboard package should include a letter containing the OSO's expectations for the candidate, PT guidance, OCS study material, and physical, mental, and moral expectations while a poolee. OSOs will consider the following for inclusion in a Welcome Aboard:

1. Clearly lay out all expectations (e.g. show up on-time, uniform for functions, etc.).

2. Consider Critical Information Requirements (poolee is no longer enrolled full-time, doesn't attain a 2.0 GPA, gets arrested, gets a tattoo, gets injured, etc.).

3. Provide poolees with general knowledge to begin studying for OCS (e.g. general orders, rank structure, links to OCS study material online, etc.).

4. Explain the OST's award system for referrals and any assistance the OST needs in recruiting efforts/activities.

5. Discuss poolee actions required to prepare for training at OCS and maintain officer program eligibility:

a. Physical conditioning (set individual objectives for the poolee)

b. Maintain GPA

c. Marine Corps Tattoo Policy

d. Medical requirements

e. Marine Corps Drug Policy

6. Discuss any personal or family issues that might arise and affect the poolee's focus on preparing for OCS. (Examples include spousal/family support for decision to enter the program, family members with health issues, family care program for candidates with young dependents, marital issues, etc.)

7. Discuss the impact of the poolee's conduct as a member of the pool with regard to the reputation of the Marine Corps in the school and community.

8. Discuss information about other poolee's in the program who can assist with the poolee's development.

9. Describe candidate incentives for various accomplishments (top performers at OCS, 300 PFT, 100-mile run club, etc.).

16008. PLC POOL SUPPLEMENTAL PROGRAMS. The programs below are available to PLC poolees as described.

1. FAP and MCTAP. After a poolee completes their initial training at OCS (completion of either PLC Juniors or PLC Combined), the poolee is eligible for the supplemental programs listed below. Poolees may receive both FAP and MCTAP at the same time, and they may apply for the programs in successive years. The Financial Assistance and the Marine Corps Tuition Assistance Programs have specific requirements which may, or not be, in the poolee's best interest. It is the OSO's responsibility to counsel each candidate on the requirements for each program. Refer to Chapter 4 of this Guidebook and the listed references for amplifying guidance on the FAP and MCTAP.

a. Financial Assistance Program (FAP). The FAP provides once-trained and fully-trained candidates in the PLC pool program up to \$3150.00 per academic year for a subsistence allowance payment. Refer to Chapter 4 of this Guidebook and Marine Corps Recruiting Command Order (MCRCO) 7220.1 for amplifying guidance on the FAP.

b. Marine Corps Tuition Assistance Program (MCTAP). The MCTAP provides once-trained and fully-trained candidates up to \$5200.00 per academic year for reimbursement of tuition-related expenses. Refer to Chapter 4 of this Guidebook and Marine Corps Order (MCO) 1560.33 provides amplifying guidance on the MCTAP.

3. Tricare for Lieutenants. Lieutenants awaiting TBS are eligible for Tricare. For additional details, refer to MCRCO 1100.2, Officer Commissioning Manual.

16009. PLC LAW POOL PROGRAM. The OSO is responsible for PLC Law poolees; however, the MCRC Deputy Staff Judge Advocate (SJA) is the PLC Law Program Manager. PLC Law Poolees do not follow the traditional path of other PLC poolees. The information below relates specifically to PLC Law candidates and lieutenants. OSOs should direct PLC Law program questions toward the MCRC Deputy SJA.

1. PLC Law candidates attend PLC Combined during the summer after they are selected; they receive their commission upon completion of OCS.

2. PLC Law lieutenants are eligible for summer internships, when available, between school years. If selected for the internship, the Marine Corps

assigns the lieutenant Permissive TAD orders for On-the-Job-Training (OJT). MCRC publishes annual FROST Calls with application instructions.

3. PLC Law lieutenants are directed to sign up for, and take, the first Bar available after completion of law school.

4. After taking the Bar, PLC Law lieutenants are eligible for a Post-Bar and Pre-TBS internship, when available. If selected for the internship, the Marine Corps assigns the lieutenant Permissive TAD orders for On-the-Job-Training (OJT) prior to attending TBS. MCRC publishes annual FROST Calls with application instructions.

5. PLC Law lieutenants are eligible for promotions. The MCRC Deputy SJA coordinates promotion documents for the lieutenants.

CHAPTER 17

Candidate Shipping, Induction at OCS, and Post-OCS Requirements

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	17000	17-2
DEFINITIONS	17001	17-2
SHIPPING REQUIREMENTS	17002	17-2
PROGRAM-SPECIFIC SHIPPING REQUIREMENTS	17003	17-4
SHIPPING	17004	17-4
INDUCTION	17005	17-5
POST-OCS REQUIREMENTS	17006	17-5

CHAPTER 17

Candidate Shipping, Induction at OCS, and Post-OCS Requirements

17000. GENERAL. After a candidate is selected to attend OCS, or scheduled to attend their second summer of training (PLC Seniors), the OST is responsible for ensuring the candidate "ships" to OCS prepared to begin training. It is unacceptable for an OSO to ship candidates to OCS who are unable to induct into training. MCRC has implemented the requirements below for processing candidates shipping to OCS and to attempt to minimize attrition. The OST maintains continued responsibility for candidates through OCS, and in most cases, the OST has additional responsibilities after OCS.

17001. DEFINITIONS.

1. Shipping. Shipping is the act of ensuring all selected and scheduled candidates report to OCS with all required documentation.
2. Induction. Induction occurs when OCS identifies a candidate as physically, medical, and morally qualified to start training, and the candidate begins training.
3. Courtesy Shipper. A Courtesy Shipper is a candidate who departs for OCS from a location outside the contracting OSO's AO.

17002. SHIPPING REQUIREMENTS. MCRC and OCS maintain a few basic shipping requirements for all candidates; however, different programs have different requirements the OST must accomplish prior to shipping. The section below describes the basic shipping requirements common to all candidates; considerations for specific programs are described in future sections of this chapter.

1. Scheduling Candidates for OCS. Candidates selected for the OCC program, attend the class for which they were selected. Similarly, candidates applying for the PLC Combined course, attend the PLC Combined course during the summer immediately following the selection board on which they were selected. Scheduling candidates for PLC Juniors and PLC Seniors requires OST and District planning.

- a. OSTs are responsible for scheduling, and updating information as necessary, for all candidates selected to attend OCS in MCRIS-OS. OSO's must remember to schedule PLC Seniors for training per District requirements.

- b. In addition to OCC and PLC Combined, OCS conducts two, six-week increments of training each summer. 1st Increment typically trains from the end of May through July 4th. 2nd Increment typically trains from just after July 4th through the first or second week of August.

- c. The District is responsible for sending approximately 50% of PLC Juniors to each increment of training, and 50% of PLC Seniors to each increment of training. For this reason, OSOs will strive to send 50% of PLC Juniors to each increment of training, and 50% of PLC Seniors to each increment of training.

- d. Females. Due to the number of females OCS trains, support staff, etc., females attend PLC Juniors during 1st Increment and PLC Seniors during 2nd Increment.

2. NAVMC 10468, Request for Orders (RFO). Candidates request orders to OCS utilizing the NAVMC 10468. After the candidate signs the RFO, the OST submits it to the District, and the District creates orders for the candidate.

a. Districts typically request RFOs from the OST within a week or two of the release of selection results.

b. PLC Seniors. Candidates do not always attend PLC Seniors during the summer immediately following when they attended PLC Juniors (e.g. candidates selected during their freshman year); OSO's are responsible for declaring which poolees will be returning to OCS for PLC Seniors. OSTs are responsible for submitting RFOs for returning PLC Seniors per District requirements.

3. Transportation Shipping Report (TSR). The OST is responsible for coordinating transportation for candidates to OCS. OCC candidates are authorized to drive to OCS; however, PLC candidates are not authorized to drive. OSTs outside a reasonable driving distance from OCS will schedule flights for their PLC candidates through Sato Travel.

a. OSOs are responsible for ensuring each candidate's travel arrangements are annotated in MCRISS-OS per District requirements.

4. Courtesy Shippers. The contracting OSO is responsible for all administrative requirements for their candidate. In the event a candidate is shipping to OCS from a location outside the contracting OSO's AO, the contracting OSO will contact the local OSO to request assistance with conducting shipping requirements.

5. OSTs must ensure candidates are qualified to attend OCS, and that they possess all required documentation, prior to shipping. OSTs will create medical records and shipping records (per MCRC checklists) for each candidate; OSTs will forward medical records to the District Corpsman (per District requirements) and send shipping records with the candidate. Typical problem areas OSOs should consider include:

a. Current medical qualification (annual certifications, BUMEDs, etc.). Refer to MCRCO 1100.2, Officer Commissioning Manual, for specific medical requirements.

b. Current HIV test, Dental exam/SOU (as applicable), Pap Smear (if required). Refer to MCRCO 1100.2, Officer Commissioning Manual, for specific medical requirements.

c. Copy of immunization record.

d. Copy of blank check and direct deposit form.

6. Pre-Ship Screening and Brief. The OSO will conduct a pre-ship screening and brief to evaluate candidate readiness approximately 30 days prior to shipping. OSOs must conduct the Pre-Ship Screening and Brief in person. OSOs will utilize the MCRC Pre-Ship Checklist to conduct the screening and will brief candidates regarding what to expect at OCS. The Pre-Ship Screening and Brief will include the following:

a. PFT, height, weight, and body fat percentage check (if required). OSOs will administer the PFT, and conduct the height, weight, and body fat percentage check. It is imperative the OST continues to monitor each candidate's PT regimen prior to OCS to ensure candidates arrive at OCS prepared to induct into training.

b. Review the candidate's orders and transportation arrangements.

c. Viewing of the OCS Pre-Ship video. Attempt to minimize the culture shock and stress the candidate will feel at OCS, especially early in training.

d. Review of the candidate's pre-shipping requirements and preparation.

e. Review any personal or family issues that might arise and interfere with the candidate's focus on completing OCS. Examples include re-screening for injuries, spousal/family support, family members with health issues, family care plan, etc.

f. Verify candidate has established a MyPay account.

g. Conduct safety briefs and vehicle inspection checklists for candidates authorized to drive.

17003. PROGRAM-SPECIFIC SHIPPING REQUIREMENTS. The items listed below are additional program-specific procedures the OST must consider prior to shipping.

1. OCC and PLC Law. OCC candidates and PLC Law candidates commission upon completion of OCS, because of this, these candidates require additional procedures prior to shipping.

a. Security Clearance Initiation. The OSO is responsible for ensuring that each candidate arriving at OCS has initiated a security clearance. Candidates must complete the SF-86 (Questionnaire for National Security Positions), sign the completed document in MCRIS-OS, and submit finger prints to the OST to complete the initiation. [PLC candidates must initiate a security clearance investigation prior to submission of their Request For Appointment (RFA). See Chapter 21 for additional information pertaining to the RFA.]

b. Request For Appointment (RFA). MCRC requires RFAs be submitted and at MCRC-OA (MCRC Officer Appointments) no later than 120 days prior to a candidate's scheduled commissioning date. Due to the fact that OCC and PLC Law applicants are often selected less than 120 days prior to their OCS class' graduation/commissioning date, OSTs must be prepared to submit RFAs for these candidates following the release of selection board results.

2. Candidates serving in the SMCR. OSOs are responsible for providing a copy of candidates' orders to the appropriate reserve unit for entry on the unit diary.

17004. SHIPPING. OSOs must maintain contact and continuing preparing candidates for OCS between the 30-day Pre-Ship and shipping. On the day of shipping, a member of the OST will be present at the place of departure for all candidates. The member of the OST will conduct final coordination/briefing of candidates regarding travel arrangements, instructions, final verbal screening, etc.

1. Based on the data the OST enters in MCRISS-OS (which populates on the TSR), OCS will make every effort to transport candidates from Ronald Reagan Washington National Airport to OCS.

2. In the event a candidate does not ship to OCS for any reason, the OSO will notify the District AOP and the RS CO as soon as possible.

17005. INDUCTION. Beginning training at OCS requires:

1. Passing the medical screening.

2. Passing the Moment of Truth (moral screening).

3. Passing the PFT with a minimum score of 225 while attaining the following minimums in each category:

a. Males.

(1) 8 pull-ups

(2) 70 crunches

(3) 24 minute 3-mile run

b. Females.

(1) 50 second flexed-arm hang (option for pull-ups is at the discretion of the OCS CO)

(2) 70 crunches

(3) 27 minute 3-mile run

4. Being accepted into training.

17006. POST-OCS REQUIREMENTS. OSOs maintain responsibilities for PLC poolees upon completion of training, and for PLC and OCC candidates dropped at OCS. Regardless of a candidate's status with respect to completion of OCS, OSOs should solicit feedback from candidates regarding their preparation for OCS; balanced feedback from candidates and lieutenants will assist the OST in developing a more effective pool program.

1. OCC candidates who complete training and accept their commission report directly to TBS. OSOs should maintain contact these lieutenants to take an interest in their careers and facilitate PTAD opportunities.

2. OSOs are responsible for creating drop packages, per District guidelines, for all candidates who do not ship to, or complete training at, OCS.

3. PLC candidates who complete training will require either scheduling for PLC Seniors, or preparation for commissioning. OSTs will enter appropriate information on the candidates' pool card in MCRISS-OSS. Refer to Chapter 16, How to Maintain an Effective Pool Program, and Chapter 21, Commissioning, for additional details regarding the OSO's requirements with respect to poolees who complete training at OCS.

4. OSOs maintain a significant responsibility for candidates whom OCS drops for medical reasons. In the event a candidate is injured at OCS and is unable to complete training, OCS will treat the candidate until they are stable. After a candidate is stable, OCS makes a recommendation pertaining to the candidate's receipt of a Line of Duty (LOD) determination from HQMC and sends the candidate home. The OSO is responsible for managing the candidate's medical treatment when he/she returns home if the candidate received an LOD determination. Refer to MCRCO 1100.2, Officer Commissioning Manual, for additional details regarding the LOD process; however, OSOs may use the process below as a general guideline for the LOD process:

a. Candidate gets injured, OCS stabilizes the candidate, and the CO of OCS determines whether or not to drop the candidate.

b. When OCS drops a candidate, OCS sends a drop report to MCRC who will change the candidate's RUC (Reporting Unit Code) from OCS to the appropriate reserve RUC to permit the submission of LOD benefits.

c. OCS will complete basic LOD paperwork (e.g. Privileges and Responsibility Statement) with the candidate and provide the candidate with their orders and transportation home.

d. OCS instructs candidates to report to their OSOs within five days of departing from OCS.

e. Each OST must maintain two accounts in the Marine Corps Medical Entitlements Data System (MCMEDS) for the management of candidates in an LOD status. Typically, the HRA manages one account as the Case Administrator, and the OSO manages the second account as the Unit Reviewer. The OST creates the LOD case in MCMEDS and forwards the case to RMED (Reserve Medical Entitlements Determination Section of Wounded Warrior Regiment).

f. After the OST submits all required documentation, RMED approves the LOD determination and the candidate is authorized to receive medical care under Tricare. OSOs are strongly encouraged to be heavily involved in the LOD process; there are specific rules and regulations governing the care of where candidates can receive treatment, how it's paid for, etc.

g. A candidate's LOD case in MCMEDS will require monthly updates and extensions every six months, if the case continues that long. Candidates remain in a LOD status until they are either returned to full-duty, non-compliant, or are processed on a medical review board.

h. If a candidate is returned to full-duty, the OSO will either dis-enroll the candidate from the officer program which he/she was a member, or explore options with the District AOP for sending the candidate back to OCS.

i. If a candidate is non-compliant or processed on a medical review board, the OSO will dis-enroll the candidate from the officer program which he/she was a member.

CHAPTER 18

How to Work the OSO Command Recruiting Program

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	18001	18-2
UTILIZATION OF TAD OFFICERS	18002	18-2
ADMINISTRATIVE NOTES	18003	18-3

CHAPTER 18

How to Work the OSO Command Recruiting Program

18001. GENERAL. The OSO Command Recruiting Program is a support program designed to provide additional manning to the OST for assistance in the recruiting effort. The ultimate purpose of the program is to generate new contracts. The Command Recruiting Program is essentially the use of TAD officers to support the OST. When utilized effectively, the program will significantly enhance the OST's efforts toward mission accomplishment.

18002. UTILIZATION OF TAD OFFICERS. Depending on the availability of funds, and the availability of the officer, the opportunity exists for the OST to utilize both TAD and PTAD officers for support. The sections below describe the request process and the potential uses for these officers.

1. Permissive TAD (PTAD) Officers. An officer assigned Permissive TAD is usually a newly commissioned second lieutenant awaiting assignment to TBS, or training at MOS school, or flight school. The opportunity to use PTAD officers is based on the availability of the officer and PTAD funds. In most cases, an OSO will only receive PTAD officers after the officer has reported to TBS. [Officers awaiting TBS have not yet been accessed into the Marine Corps and officially fall under reserve unit roles as members of the Individual Ready Reserve (IRR). OSOs will not normally have the opportunity to bring lieutenants from the OST's pool on PTAD due to the availability of funds in the MCRC Reserve Support Officer's budget. After an officer reports to TBS, the officer is on the Marine Corps' active duty list and is receiving pay; therefore, the issue of identifying PTAD funds is no longer an issue.]

a. Prior to the OSO requesting a Marine be assigned PTAD, the OSO must ensure the officer is fully informed that they will be bearing all the expenses of working at the OSS (housing, food, transportation to and from the office, etc.).

b. Process for PTAD requests. The process for PTAD requests varies and is dependent upon the status of the officer for whom the OSO is requesting PTAD.

(1) To request a PTAD officer before he/she reports to TBS, the OSO must submit a request through the MCD AOP to the Head of Officer Programs (OP) at MCRC. The Head of OP will coordinate with the MCRC Reserve Support Officer to determine if funds exist and if the officer's PTAD will affect MCRC's accession mission. If approved, the PTAD officer will usually be granted 45 - 60 days to work with the OSO.

(2) After an officer has reported to TBS, the OSO will coordinate directly with the TBS Company, MOS school, or flight school for requesting PTAD officers. It is not uncommon for officers at flight school to have a lengthy wait to begin training. In these cases, the individual flight schools are often willing to facilitate PTAD orders.

(3) OSOs will ensure PTAD officers check in with the RS prior to commencing work with the OSS.

(4) OSOs will brief PTAD officers regarding OSO duty rules and regulations, professional conduct, etc.

2. TAD Officers. OSOs may request the support of any Marine officer the OSO feels will assist in the recruiting effort. OSOs should attempt to request individuals as a proof-source for targeted recruiting events. Consider requesting individuals from within the OSOs chain of command first, and then consider the operating forces. Examples of proof-sources for targeted events include minorities, females, judge advocates, aviators, etc. OSOs can use MCRC Diversity, the MCRC Deputy Staff Judge Advocate, and the AAOP to assist in identifying proof-sources for targeted events.

a. OSOs will submit requests to the District AOP, and the District will forward requests as required.

b. OSOs must justify the need for a Marine to be TAD from the operating forces.

c. Prior to an event, the OSO will brief the TAD officer on the basics of the officer programs and how the officer can support the OST's mission.

18003. ADMINISTRATIVE NOTES.

1. In accordance with MCO P1610.7_, Performance Evaluation System, OSOs are required to write a fitness report on any PTAD officer of equal or lesser rank who is assigned to the OST for 30 days or more. OSOs will model the billet description after the OSA's duties.

2. The RS is responsible for endorsing the Marine's orders upon arrival and departure.

3. The PTAD or TAD officer can be recognized in a variety of different ways for the hard work and dedication they contributed to the OSS' recruiting efforts. If applicable, OSOs will initiate actions for awards commensurate with the degree of support the officer provided.

CHAPTER 19

How to Develop and Work Professional Contacts

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	19001	19-2
LOCATING CONTACTS	19002	19-2
DEVELOPING THE CONTACT	19003	19-3
PREPARING AND USING THE CONTACT CARD	19004	19-4

CHAPTER 19

How to Develop and Work Professional Contacts

19001. GENERAL. This chapter closely relates to Chapter 8, How to Work the College Relations Program. It is in the OSS' best interest to develop relationships with key individuals in the AO. Developing professional relationships with key influencers can assist the OST in gaining access to previously closed markets, contribute to the OST's effort to gain referrals, and provide immeasurable benefits to the OST. In recruiting, an individual who contributes to the recruiting effort is sometimes called a key influencer or a contact (different than a prospective applicant contact).

19002. LOCATING CONTACTS. The most important contacts are those who provide referrals, can assist in opening previously closed markets, or who can provide some sort of benefit to the OST. To initiate a program that will locate these key individuals within the community the OSO/OSA should first look in the following locations:

1. Start with the campus in the areas you are likely to find the prospective applicants you need.

- a. Assistant Athletic Directors (AAD). These individuals are often less-busy than the Athletic Directors and are able to take more time to meet with the OSO. Consider sending the individual to the Educator's/Key Leader's Workshop. A professional relationship with the AAD, combined with the AAD's understanding of the Marine Corps' focus on leadership, teamwork, and physical fitness, can assist in getting the OSO in front of all the college or university's coaches.

- b. Engineering Department Counselors and Flight Program Instructors. A good number of individuals in university flight programs and engineering majors are interested in military aviation. Build relationships with individuals who will help the OST educate their students and push referrals to the OST.

- c. Diversity Affairs Organizations. These organizations are often interested in conducting leadership seminars. Reach out to the organizations and attempt to build a partnership. Additionally, reach out to MCRC's Diversity officers to learn more about diversity-related events in the OST's AO.

- d. Consider other key individuals on campus such as those affiliated with the campus' rec sports, the campus gym, ROTC units, the band (to provide contacts for enlisted recruiters), etc.

2. Visit the local Reserve unit and work with the Prior Service Recruiters to identify potentially influential Reserve members (SMCR units and IRR) in the area.

3. Use local military associations (Veterans of Foreign Wars, Marine Corps League, and Navy League) to contact retired and former military members for referrals of friends and relatives. An OSO/OSA may consider joining some of these organizations to facilitate the ease of gaining more contacts.

4. Contact owners of local businesses (e.g. gyms, restaurants, and other locations college students frequently visit in the OST's AO); ask for their

assistance in advertising (Take-One stands) and the possibility of directly referring individuals.

5. The OSS can often develop the former Marine who does not want to reenlist into a contact in the local community. Consider providing incentive items to these individuals for referrals.

19003. DEVELOPING THE CONTACT. Once the OSO/OSA identifies a beneficial contact, the OSO will reach out to the individual to schedule a meeting, and plan for the meeting and potential future interactions.

1. OSOs should consider the following when planning/conducting the initial visit with a contact:

- a. Build Rapport.
- b. Introduce the contact to the Marine Corps Officer Programs and officer selection standards.
- c. Discuss the benefits an affiliation with the Marine Officer Programs can have for students and the organization.
- d. Be prepared to provide proof source names of candidates in the program, or other similar individuals, who might have an affiliation with the contact.
- e. Inform the contact of the specific support needed, and ask them how they can contribute to the OSS' recruiting effort.
- f. Inform the contact that you will be occasionally following up with them.

2. For each contact with which the OSO meets, the OSO will record the individual's contact information, benefit to the OST, and follow-up information in MCRISS-OSS. If the contact is affiliated with a college or university, the OSO will record the contact's information on the College Visit Card in MCRISS-OSS. If the contact is someone from the local community who is not directly affiliated with a specific college or university, the OSO will create a Contact Card in MCRISS-OSS to store the contact's information and maintain regularly scheduled communication with individual. (Paragraph 19004 addresses the use of the MCRISS-OSS Contact Card.)

3. It is important to recognize and reward contacts for their help. Consider the following:

- a. Consider giving a productive contact an incentive item (e.g., a T-shirt, desk calendar, coffee mug, hat, etc.).
- b. Consider providing contacts with plaques or certificates highlighting their contribution to the Marine Corps recruiting effort.
- c. If appropriate, introduce the contact to the RSCO; lunch or a visit with the RSCO might motivate the contact.
- d. Use tokens of appreciation judiciously; don't overdo the awards program, but don't neglect it either.

19004. PREPARING AND USING THE CONTACT CARD. The OSO will create a Contact Card in MCRISS-OSS for each professional contact the OST meets who is not directly affiliated with a college or university. Contact Cards for professional contacts are located in the Mission Planning Module of MCRISS-OSS.

1. The OSO will use the Contact Card to record the contact's value to the recruiting effort, assistance the contact provides to the OST, and to maintain regularly scheduled communication with the individual.

2. OSOs will work each contact using the contact card in the following manner:

a. Complete the contact card in MCRISS-OSS.

b. Enter the specific value the contact provides to the OST on the Contact Card.

c. Annotate the initial visit and schedule the contact for a follow-up (as with PACs, the OSO/OSA needs to update the contact card's action date to reflect the follow-up date). The frequency of communication with each contact will depend on the nature of the support the contact provides. OSOs should plan regularly scheduled communication with each contact.

d. Record the results of each follow-up on the Contact Card in MCRISS-OSS, and ensure the contact is scheduled for the next follow-up.

e. Periodically, analyze the results on each Contact Card to determine if the contact is worthwhile or if the frequency of contact needs to be adjusted.

f. Work the contact for one year. If the OSO deems the results to be insufficient, consider less-communication with the contact in the future.

CHAPTER 20

How to Set Up an Officer Selection Station

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	20001	20-2
OFFICE COMPONENTS	20002	20-2
ADMINISTRATIVE NOTES	20003	20-3

CHAPTER 20

How to Set Up an Officer Selection Station

20001. GENERAL. An Officer Selection Station (OSS) is the base of operations for the OST. The OSS is the location the OST will conduct the majority of interviews, administer the Aviation Standard Test Battery (ASTB-E), and contract applicants. For these reasons, the OSS must be set up and maintained to present a professional business atmosphere at all times.

20002. OFFICE COMPONENTS. OSOs may organize their OSS as necessary to maximize mission achievement provided the OSS presents a professional business atmosphere and incorporates the required elements of systematic recruiting.

1. Office Layout. Each OSS must have several components to effectively support the OST's recruiting efforts.

a. Reception Area. The reception area serves a number of functions for the OST. The reception area is the location a member of the team will greet prospects, where prospects will watch videos (unless space allows for a separate room), and where prospects will wait for appointments, etc. Due to space restrictions, this area usually serves as the working space for the HRA.

b. Testing Area. The testing area is the location the OST will administer all Enlisted Screening Tests (EST) and ASTB-Es. The testing area should be secluded, and as quiet as possible to allow prospects/applicants to concentrate on taking tests.

c. Storage Area. The storage area is the location the OST will store all of the collateral materials, extra gear, etc.

2. Systematic Recruiting Components. Each OST will maintain the following within their OSS:

a. Assets Map. The Assets Map will be displayed prominently in the office. It shows the area in which the team operates and the location of all the OST's resources. The assets map is a useful tool when developing the annual plan and it serves to constantly remind the OST that effective time management skills are essential when scheduling appointments and school visits. The map legend illustrates key resources. Examples include the location of the: OSS, RS (RS), Recruiting Sub-Stations (RSS'), MEPS, Mobile Examination Test (MET) sites, and all colleges/universities (Priority 1, 2, 3 and non-working). The MCRC standard legend is:

LEGEND

- OSS - WHITE PIN
- RS - GOLD PIN
- MEPS - PINK PIN
- RSS/PCS - BLACK PIN
- SMCR/MTU - PURPLE PIN
- NROTC - BLUE PIN
- MET SITE - ORANGE PIN
- NON-WORKING SCHOOL - RED PIN
- PRI 1 SCHOOL - GREEN FLAG

- PRI 2 SCHOOL - YELLOW FLAG
- PRI 3 SCHOOL - RED FLAG
- COMMUNITY COLLEGE - WHITE FLAG

b. Mission Board. The OST will maintain a physical Mission Board in the OST; the Mission Board will reflect the OST's assigned mission and progress by component, category, and year group. The physical mission board serves as a constant reminder of the OST's mission and progress. It matches the mission exactly as assigned by the RSCO; it matches the OST's annual plan; and, it displays the mission attainment results for the FY. In addition to the physical Mission Board, the OSO will maintain the Mission Board in MCRISS-OSS; the Mission Board in MCRISS-OSS will match the physical Mission Board. Guidance for utilizing the MCRISS-OSS Mission Board Module is located in the MCRISS User Manual on the MCRISS homepage.

c. New Working Applicant Board (Working NWAs). The NWA Board is physical board hanging on the wall in the OST; it serves as a constant reminder of processing priorities and requirements. The OST uses this board to drive processing to reduce the time it takes to get an NWA through the processing chain. This board lists all NWAs as they are claimed in chronological order by the date the applicants started working. This board is updated as changes occur. The OSO/OSA will fill in all required information on the New Working Applicant Board, recording any changes and/or progression for each NWA. As processing milestones are completed and documents are received, the OSO/OSA will place an "X" in the appropriate block of the NWA Processing Board. Upon receipt of all required documents, the OST schedules the applicant for contracting. In addition to the physical board, there is an NWA Checklist feature in MCRISS-OS (NWA view) that allows OST members to track what processing has been completed for each individual applicant; this NWA View in MCRISS-OS is different than the NWA Board in MCRISS-OSS. The NWA Board in MCRISS-OS (NWA View) will match the physical NWA Board in the OSS. Guidance for utilizing the NWA Modules in MCRISS are located in the MCRISS User Manual on the MCRISS homepage.

d. Candidate Pool Board. The Pool Board reflects the status of contracted, once-trained, and fully-trained candidates for the current mission year. The purpose of the pool board is to provide a snapshot of the status of the OST's pool and display pertinent information regarding each Poolee. The OST will maintain a physical Pool Board in the OST, and the MCRISS-OSS Pool Board will match the physical Pool Board. Guidance for utilizing the MCRISS-OSS Pool Board Module is located in the MCRISS User Manual located on the MCRISS homepage.

e. Application Files. Officer applications are compiled as a hard copy and input into the Automated Commissioning Package (ACP) program for storage and submission. (Refer to the ACP Training Manual on the MCRISS homepage for details regarding how to use ACP.) The Application Files are the residual hard-copies of applications that are both currently being worked, and are closed out.

(1) New Working Applicant File. The New Working Applicant File is the central location where the OST stores all documents for the OST's applicants who have committed to applying for an officer program. As the OST receives documents, they are checked off on the application checklist within MCRISS-OS, as well as on the New Working Applicant Board within the OSS (see 2003.4).

(2) Candidate File. The Candidate File is a residual hard-copy of the documents that are uploaded and stored in ACP for all poolees after an applicant signs the contracts for their application.

(3) Closed Applicant/Candidate File. The Closed Applicant/Candidate File contains documents of individuals who initiated an application but either did not complete the process, or were denied acceptance. OSTs will maintain records for three years. Maintaining the Closed Applicant/Candidate File supports the recruiting mission in multiple ways:

(1) The OST maintains the records in case an applicant returns to initiate a second application.

(2) The OST may periodically review the Closed Applicant/Candidate File to follow up with previously interested applicants.

(3) The OST may use the Closed Applicant/Candidate File for referrals to local Recruiting Sub-Stations (RSSs).

20003. ADMINISTRATIVE NOTES.

1. Safe storage of testing material. The ASTB-E APEX testing computer and equipment must be safeguarded in a similar manner to the OST's other computers/tablets. OSTs should not have any hard-copy testing material for the EST or ASTB-E in the OSS which would require storage in a safe. If hard-copy testing materials exist, contact the appropriate entity to arrange return of the materials.

2. Office cleaning. Each OSS (and RSS) is included in a cleaning contract coordinated by the Army Corps of Engineers. If an OST has problems with the assigned contractor, the RS Supply section can provide assistance handling the matter.

CHAPTER 21

Commissioning

<u>SUBJECT</u>	<u>PARAGRAPH</u>	<u>PAGE</u>
GENERAL	21001	21-2
REQUIREMENTS FOR COMMISSIONING	21002	21-2
REQUIREMENTS FOR COMMISSIONING COORDINATING INSTRUCTIONS	21003	21-2
REQUEST FOR APPOINTMENT	21004	21-3
COMMISSIONING CEREMONY PROCEDURES	21005	21-4
COMMISSIONING CONSIDERATIONS	21006	21-7

CHAPTER 21

Commissioning

21001. GENERAL. The goal of every OST is to commission candidates as second lieutenants for active duty service or for service with a Selected Marine Corps Reserve Unit.

21002. REQUIREMENTS FOR COMMISSIONING. Candidates must meet the following criteria **prior to** commissioning:

1. Successful completion of the prescribed training course at OCS.
2. Successful completion **and verification** that the candidate has met all academic requirements for a baccalaureate degree. Under no circumstances will a candidate be commissioned without a proof of degree.
3. Completion, and current qualification, of a pre-commissioning physical examination.
4. Completion and submission of an SF86, Questionnaire for National Security Positions, and fingerprints.
5. Completion and submission of a Request For Appointment [(RFA) per MCRCO 1100.2_, Officer Commissioning Manual].
6. NAVMC 763, Officer Appointment and Acceptance Record
 - a. OST must receive the NAVMC763 (from MCRC-OA) prior to the commissioning.
 - b. Candidate, and Officer who administers the oath, must sign the NAVMC 763.
 - c. OST must return the NAVMC 763 to MCRC-OA within 24 hours of the commissioning ceremony.
7. Officer must administer the oath. Officers authorized to administer the oath include:
 - a. Active duty commissioned officer (any service).
 - b. Reserve commissioned officer currently in a drilling status (any service).
 - c. Retired commissioned officer (any service).

<p>Note: An officer who has resigned his/her commission is not authorized to administer the oath.</p>
--

21003. REQUIREMENTS FOR COMMISSIONING COORDINATING INSTRUCTIONS. The requirements outlined below apply to commissioning requirements.

1. Proof of degree. The OSO must verify proof of degree. OSOs may utilize any one of the following as proof of degree:

a. An official transcript, bearing the raised seal, with a notification of graduation.

b. A certified, legible copy of the degree awarded.

c. A letter or an Academic Certification Form (NAVMC 10469), bearing the college seal from an appropriate college official verifying that the applicant has satisfied all degree requirements and will be awarded that degree on a specific date.

2. Commissioning must occur on the scheduled commissioning day.

a. In the event a commissioning is rescheduled or cancelled after commissioning documents have been sent to the OST, the OST must inform MCRC-OA as soon as possible and either destroy or return all commissioning documents.

3. OSOs are not permitted to conduct a mock ceremony.

21004. REQUEST FOR APPOINTMENT (RFA). What is the RFA and why is it important? In short, every officer is required to be approved by the President of the United States. After the OST submits the RFA, MCRC-OA places the candidate's name on the "scroll" which is the Marine Corps' nomination of the candidate for commissioning. Scrolls are pulled once per quarter and it typically takes 45-60 days for the scroll to get approved. OSOs are responsible for the timely submission of RFAs for each candidate; if the RFA is not submitted in a timely manner, the candidate will not make it on the scroll in time, and the candidate's commissioning date will be changed. The information below is meant to serve as a guideline and is not the "be all, end all" of requirements; refer to MCRCO 1100.2_, Officer Commissioning Manual, for additional details.

1. Timing considerations for the submission of all RFAs. The information below pertains to the submission of all RFAs for both PLC and OCC candidates.

a. Medical.

(1) Ground candidates must have a current BUMED (Navy Bureau of Medicine and Surgery) qualification or DODMERB (Department of Defense Medical Evaluation Review Board) qualification which extends **through the scheduled commissioning date**.

(2) Dental. All candidates must have a current dental exam (**current through commissioning**), and meet dental requirements for commissioning. Dental exams are current for one year from the date of the test.

(3) HIV. All candidates must have a current HIV test (**current through commissioning**), and meet HIV test results requirements for commissioning. HIV tests are current for two years from the date of the test.

(4) Pap Smear. All female candidates, ages 21 and above, must have a current pap smear (**current through commissioning**). Pap smear tests are current for two years from the date of the test.

(5) NAMI Qualification. SNA and SNFO candidates must have current NAMI qualifications **through commissioning**. Refer to the NAMI qualification letter to determine the length of the qualification.

b. SF86 Questionnaire for National Security Positions. The SF86 is 26 pages and requires candidates to gather a lot of information; OSTs should plan accordingly.

2. OCC. OSTs are required to submit RFAs for selected OCC candidates within approximately two-to-three weeks after the Region's release of the selection results (with the exception of pre-selected candidates; OSTs must submit RFAs for pre-selected candidates per the 120 day timeline). Due to the short timeline of the majority of RFA submissions for OCC, OSOs must be aware of, and plan for the timing considerations mentioned above.

a. BUMED. Candidates will need a BUMED qualification if their physical was conducted at MEPS. District Corpsman will facilitate BUMED qualifications for MEPS qualified candidates following Region's release of OCC selection results.

2. PLC. OSTs are required to submit RFAs to MCRC for PLC candidates no later than 120 days prior to the scheduled commissioning date (RFAs must be at MCRC-OA no later than 120 days prior). In addition to the timing considerations mentioned above, OSTs must also consider the following:

a. BUMED. OSTs should **not** plan for BUMED to rush medical approvals for PLC candidates like they do for OCC candidates. OSTs must back plan to have BUMED qualifications complete to meet MCRC's 120 day timeline.

b. NAMI. Because PLC candidates are not NAMI qualified prior to selection as OCC candidates are, the OST must back plan to account for NAMI qualification timelines. PLC candidates typically attend NAMI after completing PLC Seniors; occasionally, PLC candidates will attend NAMI prior to completing PLC Seniors if the candidate is a December graduate. It may take up to one-two months for a candidate to get a NAMI seat and it typically takes approximately 100-110 days for a candidate to be NAMI qualified. OSOs must conduct back planning to account for these timing considerations to ensure RFAs are submitted with all qualifications.

21005. COMMISSIONING CEREMONY PROCEDURES. The OST must plan for a commissioning ceremony well in advance. The steps below outline considerations the OST must account for from preparation through completion of the ceremony.

1. Preparation.

a. Inspect the candidate's uniform well in advance. In cases which candidates are not located near a Marine Corps base, the candidate could be ordering uniforms through the mail, etc. The OSO must plan for candidates to return uniforms, sizing, etc.

b. Discuss the following with the candidate: desired location, uniform, who will be attending, who will pin on the gold bars, who will render the first salute, who will conduct the swear in, etc.

c. If someone other than the OSO will conduct the swear-in, the OSO must verify the officer is qualified.

d. Conduct a rehearsal prior to the day of commissioning.

e. On the day of the event, ensure the setting is prepared, colors are set in place, chairs (if used) are arranged, and the sound system (for National Anthem, Anchor's Away, and Marines' Hymn) are set up and tested. The OSO will ensure that a copy of the oath is available for review prior to the ceremony. Figure 21-1 displays the proper arrangement of the U.S. and Marine Corps Colors.



Figure 21-1 - Proper arrangement of U.S. and Marine Corps Colors

f. Conduct a final rehearsal the day of the commissioning.

2. Example Commissioning Ceremony. When all preparations are complete, the ceremony will proceed as follows:

a. OSO, commissioning candidate, and person administering the oath (if other than the OSO), take positions in front of the colors facing the audience, standing at ease.

b. Playing of the National Anthem.

c. OSO gives the welcome:

"Ladies and Gentlemen, welcome to today's commissioning ceremony, during which _____ will be commissioned as an officer of Marines."

"My name is _____ and I am the Officer Selection Officer for Marine Corps RS _____. "Today _____ will attain a goal he/she has been working hard to achieve for the past _____ years. As a member of the Platoon Leaders Class program, _____ was required to maintain full-time student status throughout the school year and attend Marine Corps training at Officer Candidate School, commonly referred to as OCS, in the summer."

"OCS, located in Quantico, Virginia, is where we evaluate officer candidates to determine if they have the leadership potential to lead America's Marines. It is a physically, mentally, and emotionally demanding test, and not all who attempt it succeed."

"_____ met this challenge and proved that he/she has what it takes to be a leader of Marines. Now that he/she has graduated from college, he/she is ready to assume the title of second lieutenant."

"Upon commissioning, all new officers report to Quantico, Virginia to attend The Basic School, commonly referred to as TBS, for six months. TBS is where lieutenants are groomed by experienced officers in preparation for their first assignment as a Marine Corps officer. They study everything from how to conduct an attack in an urban environment to proper etiquette for a formal dinner with foreign dignitaries. Upon completion of The Basic School, _____ will attend an occupational specialty school in preparation for service in the Fleet Marine Force."

"I am sure _____ is anxious to begin his/her journey, so let's get started."

d. The OSO calls attention and reads the introduction:

"We are Marines in the third century of the Marine Corps."

"We salute those first few men, who in the fall of 1775, began a military legend, and all those who followed in their footsteps."

"Had they not been the men they were, we could not be who we are - United States Marines."

"That is where we stand."

"If there are a few with pride who want to stand with us over the last (insert # of years) proud years - let them do as we did."

"Accept the challenge and earn the title, United States Marine."

e. Remain at attention, OSO reads the commissioning warrant.

f. Candidate and person administering the oath execute a center facing movement, both raise their right hands and the candidate repeats each phase of the oath as it is given. Oath of Office:

"I (state your full name) do solemnly swear (or affirm) to support and defend the Constitution of the United States against all enemies, foreign and domestic. That I will bear true faith and allegiance to the same. That I take this obligation freely, without any mental reservation or purpose of evasion. That I will well and faithfully discharge the duties of the office upon which I am about to enter, so help me God."

g. Upon completion of the oath, the new second lieutenant and the person administering the oath face toward the audience.

h. The OSO asks the designated person or persons to come forward to pin on the bars.

i. The OSO announces, "At this time Second Lieutenant _____ will receive his first salute as a commissioned officer from _____."

j. _____ comes forward, positions him/herself at attention in front of the Lieutenant and salutes. Lieutenant returns the salute. The OSO announces, "Lieutenant _____ will now give _____ a silver dollar to signify the respect he/she has for the enlisted men and women he/she will be commanding in the future."

k. The Lieutenant then places the silver dollar in _____ left hand, shakes his/her hand, and resumes the position of attention. _____ takes one step back, salutes, waits for Lieutenant _____ to salute, and then returns to his/her original position.

l. (IF APPLICABLE) The OSO announces, "Second Lieutenant _____ will now be presented the Mameluke Sword." The person presenting the sword comes forward with the sword. The OSO reads the sword presentation:

"The Mameluke sword is a weapon unique to Marine Corps officers. The tradition of this weapon dates back to 1805, when Marine Lieutenant Presley O'Bannon was awarded a Mameluke sword by the Governor of Derna, Tripoli for his actions against the Barbary Pirates. Marine officers alone are authorized to carry this weapon, and it is the oldest weapon in continuous service in the United States inventory."

m. The OSO then announces:

"Ladies and gentlemen, it is my pleasure to present to you Second Lieutenant _____, United States Marine Corps." The OSO begins to applaud and the audience will follow.

n. The OSA plays Anchor's Aweigh and the Marines' Hymn.

o. The OSO closes the event by stating:

"Ladies and gentlemen, this concludes the commissioning ceremony. Thank you for attending."

21006. COMMISSIONING CONSIDERATIONS.

1. OSOs must ensure the commissioning location is professional and portrays a positive image of the Marine Corps.
2. OSOs should attempt to conduct commissioning ceremonies in conjunction with college or university graduations whenever possible to enhance the event for the individual and gain exposure for the Marine Corps.
3. The OST's professionalism is on full-display at commissioning ceremonies. OSOs must prepare for commissioning ceremonies through rehearsals, uniform inspections, appropriate set up of equipment, etc.

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Systematic Recruiting Inspection		
RS/OSS:		
Date:		
Inspecting Official:		
Inspection Results:	Mission Capable	Non-Mission Capable
Date of Last Official Visit:		
Reason for Law Official Visit:		
Required Documentation:		

OST Personnel				
	OSO	OSA	OSA	HRA
Rank:				
Name:				
DCTB:				
RTD:				
OSOC Date:				
OSAC Date:				
PAR Date:				
MC3 Date:				
MC3 1-5 Sustain Date:				
MC4 Date:				
Notes:				

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

PLC Past FY Mission Attainment									
	Grnd	SNA	SNFO	Law	Fem	AA	Hisp	Oth	Total
Mission:									
Submitted to Distr:									
Selected:									
Shipped:									
Completed OCS:									
Commissioned:									
Notes:									

OCC Past FY Mission Attainment										
	Grnd	SNA	SNFO	Res	Law	Fem	AA	Hisp	Oth	Total
Mission:										
Submit to Distr:										
Selected:										
Shipped:										
Completed OCS:										
Commissioned:										
Notes:										

Previous FY Mission Attainment Statistical Data								
Program	SAT/ACT	AFQT	ASTB	LSAT	GPA	Contr PFT	Ship PFT	C-to-C Timeline
PLC:								
OCC:								

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Current FY PLC Mission Attainment									
	Grnd	SNA	SNFO	Law	Fem	AA	Hisp	Oth	Total
Mission:									
Submitted to Distr:									
Selected:									
Shipped:									
Notes:									

Current FY PLC Mission Attainment									
	Grnd	SNA	SNFO	Law	Fem	AA	Hisp	Oth	Total
Mission:									
Submitted to Distr:									
Selected:									
Shipped:									
Notes:									

Current FY PLC Mission Attainment									
	Grnd	SNA	SNFO	Law	Fem	AA	Hisp	Oth	Total
Mission:									
Submitted to Distr:									
Selected:									
Shipped:									
Notes:									

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Current FY OCC Mission Attainment										
	Grnd	SNA	SNFO	Res	Law	Fem	AA	Hisp	Oth	Total
Mission:										
Submit to Distr:										
Selected:										
Shipped:										
Commissioned:										
Notes:										

Current FY OCC Mission Attainment										
	Grnd	SNA	SNFO	Res	Law	Fem	AA	Hisp	Oth	Total
Mission:										
Submit to Distr:										
Selected:										
Shipped:										
Commissioned:										
Notes:										

Current FY OCC Mission Attainment										
	Grnd	SNA	SNFO	Res	Law	Fem	AA	Hisp	Oth	Total
Mission:										
Submit to Distr:										
Selected:										
Shipped:										
Commissioned:										
Notes:										

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

General		
	Yes	No
- Does the OST have the most current copy of the Volume II?		
- Does the OST have the most current copy of MCRCO 1100.2, OCM?		
- Can the OSO accurately describe the Officer Procurement Process?		
- Does the OST have the most current copy of the Barron's Profiles of American Colleges?		
- Have the OSO describe the OST's relationship/interactions with the RS CO, SgtMaj, RI, Admin Section, Supply Section, and RSS SNCOICs.		
- How does the OST track E-to-O, and O-to-E, referrals?		

Application Files (New Working Applicant File; Candidate File; Closed Applicant File)		
<i>New Working Applicant File</i>	Yes	No
- Does each NWA file have an application checklist?		
<i>Candidate File</i>	Yes	No
- Does each applicant/candidate record possess all required documents for contracting per MCRCO 1100.2, OCM? (min 25% check)		
- Are all applicant/candidate contract documents completed accurately per MCRCO 1100.2, OCM? (min 25% check)		
<i>Closed Applicant/Candidate File</i>	Yes	No
- Does the OST maintain closed applicant/candidate records for three years?		
- Does the OST refer closed applicant/candidate records to the appropriate RSS?		
Notes:		

Assets Map		
	Yes	No
- Does the OST maintain an Assets Map per the Vol II pg. 2-3?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

- Does the OST use the Assets Map to assist in the planning process?		
Notes:		

Mission Board		
	Yes	No
- Does the OST accurately maintain both the physical mission board and the mission board in MCRISS-OSS per the Vol II?		
- Does the mission board match the OST's annual plan and the RS CO's mission letter?		
- Does the mission board reflect all FY OST contracts accurately?		
Notes:		

New Working Applicant Board (Working NWAs)		
	Yes	No
- Does the OST maintain the NWA board per the Vol II?		
- Are NWAs listed in chronological order by the date each applicant started working?		
- Is the OST working NWAs aggressively and effectively to meet established phase lines?		
- Is the NWA board accurate and up-to-date? (min 25% check)		
- Does the OST establish a contract date goal at NWA declaration?		
- Is the OST using the NWA View in MCRISS-OS to track NWA progress?		
- Does the OSO use the NWA board to drive processing?		
- When does the OST declare an applicant as an NWA?		
- What is the OST's average NWA-to-contract time?		
Notes:		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Management Book		
Plans Section – Annual Plan	Yes	No
- Has the OSO conducted a detailed market analysis to analyze the OST's AO? (Market Analysis & College Profile Sheets)		
- Is the OST contracting competitive applicants? (Quality Indicator's Worksheet)		
- Did the OSO set appropriate contracting goals for each priority school/SMCR unit? (FY Number of Visits Worksheet)		
- Is the OSO's planned number of visits to priority schools/SMCR units sufficient to attain contracting goals? (FY Number of Visits Worksheet)		
- Does the annual plan indicate the OST is conducting sufficient prospecting in the appropriate markets to make mission? (Career Fairs, Orientations, MCFOPs, SMCR Visit, Presentations Worksheets)		
- Does the OST's pool plan adequately prepare candidates for the physical and mental stressors of OCS? (Pool Functions Worksheet)		
- Does the OST's visit schedule reflect the FY Number of Visits Worksheet, and do the planned visit dates take the academic calendar into account? (Visit Schedule Worksheet)		
- Has the OSO established a training plan (per Volume II requirements) to meet the OST's training needs? (Internal Training Worksheet)		
- Does the OSO have an appropriate plan to maximize the use of funds available to the OST? (Budget Worksheet)		
- Does the OST's annual plan sufficiently address historically challenging mission areas?		
- Is the OST following the annual plan and making adjustments as necessary?		
- Has the OSO entered the annual plan in MCRISS-OSS?		
- How many of the following has the OST planned and executed for the FY?		
	Planned	Executed
- MCFOPS		
- EAC Events		
- Presentations		
- Freshman Orientations		
- SMCR Visits		
- Career Fairs		
- Display Tables		
Notes:		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

--

Management Book		
<i>Plans Section – Month-in-Sight (MIS)/Daily Plan</i>	Yes	No
- Does the MIS/Daily Plan(s) reflect the OST's annual plan?		
- Is the OST using the Schedule Module in MCRISS-OSS as the OST's MIS/Daily Plan(s)?		
- Are all events on the MIS/Daily Plan(s) marked complete in MCRISS-OSS?		
- Does MCRISS-OSS accurately reflect the OSS' daily/monthly activities?		
Notes:		

Management Book		
<i>Results Section – Monthly Prospecting Results</i>	Yes	No
- Is the OST using the Schedule Module in MCRISS-OSS to track contacts, appointments, and interviews on the OST's Daily Plan?		
- Are all appointments/interviews entered in MCRISS-OSS and marked complete?		
- Are all follow-ups marked complete in MCRISS-OSS?		
- What is the total of last month's prospecting activities: <div style="display: flex; justify-content: space-between; padding: 0 20px;"> AC: TC: DC: OT: </div>		
Notes:		

Management Book		
<i>Results Section – Interview Log</i>	Yes	No
- Does MCRISS-OSS reflect all of the interviews the OSS has conducted?		
- Does each interview in MCRISS-OSS have notes from the interview and is the prospect scheduled for a follow-up?		
- Does the OST use the interview log effectively for data analysis and reviewing previous interviews to ensure follow-ups are scheduled?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Notes:

Management Book

<i>Results Section – New Working Applicant Sheet (MCRISS-OSS)</i>	Yes	No
- Does the OST maintain the NWA Sheet in MCRISS-OSS to track the status (e.g. contracted, DQ, working, “date started working” to contract timeline, etc.) of all NWAs for the current FY?		
Notes:		

Management Book

<i>Results Section – Candidate Record</i>	Yes	No
- Does the OST maintain a Candidate Record to track contracting statistics for analysis per the Volume II?		
Notes:		

Management Book

<i>Reports Section</i>	Yes	No
- Does the OST use the Monthly Activity Report for conducting data analysis per the Volume II?		
- Does the OST maintain a Data Analysis Worksheet to track yearly standards of effectiveness and ratios?		
- Is the OST establishing prospecting, interview, NWA, and contracting objectives using the Prospecting Planning Matrix and monthly Objectives Sheets?		
- Is the OST using (12) months, or a minimum of (3) months, of data for setting objectives?		
- Is the OST conducting enough prospecting to meet established objectives?		
- Does the OST adjust objectives as required?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

- Based on the current recruiting year's data (July 1-current date; found on the Data Analysis Worksheet), what is the OST's:

<u>SOE</u>	<u>BP</u>	<u>Ratios</u>
AC:	AC: %	PR: (NWA/Contr)
TC:	TC: %	CR: (Int/NWA)
DC:	DC: %	SR: (Int/Contr)
OT:	OT: %	

Notes:

Management Book

<i>Mission Letter Section</i>	Yes	No
- Has the RS CO issued the OSO a mission letter?		
- Is the OSOs mission letter up-to-date and stored in the physical management book per the Volume II?		

Notes:

Management Book

<i>Trip Reports Section</i>	Yes	No
- Has the RS, District, Region, and MCRC provided trip reports for all visits to the OST?		
- Are all trip reports uploaded in MCRIS-OSS per the Volume II?		

Notes:

Management Book

<i>Pool Section</i>	Yes	No
- Does the OSO maintain a copy of the Pool Report in the Management Book?		
- Is the OST's Pool Report up-to-date and accurate?		

Notes:

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Management Book		
<i>Notes and Reference Section</i>	Yes	No
- Does the OSO maintain appropriate notes and references in the Management Book to assist him/her in the performance of his/her duties?		
Notes:		

Working File		
	Yes	No
- Is the OST systematically working all Prospect Applicant Cards in MCRISS-OSS?		
- Is the OST systematically working all Contact Cards in MCRISS-OSS?		
- Is the OST systematically working all College Visit Cards in MCRISS-OSS?		
- Is the OST systematically working all Pool Cards in MCRISS-OSS?		
Notes:		

Officer Priority Prospect Card (OPPC) Program		
	Yes	No
- Does the OSO understand the definition of a good lead vs. a bad lead?		
- Does the OSO understand the definition of a workable lead vs. a not workable lead?		
- Identify the following for the last 12 months: <ul style="list-style-type: none"> - Returned on Time: - Past-Due Returned Late: - % of Good Leads: - % Workable: - Number referred to EPPC: - Number referred from EPPC: 		
Notes:		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Office Selection Assistant Schedule and Results Book (OSA S&R)		
	Yes	No
- Does the OSA maintain an S&R per the Volume II?		
- Does the OSA enter their prospecting results and daily activities in MCRISS-OSS?		
Notes:		

Candidate Pool Board										
	Yes		No							
- Does the OST maintain the Candidate Pool Board per the Volume II?										
- Does the OST utilize the Pool Board Module in MCRISS-OSS?										
- Does the OST maintain contact with all members of the pool and annotate contact on the pool card per the Volume II?										
- Does the OST track program eligibility for all poolees? (e.g. academic status, medical status, physical fitness, commissioning requirements, etc.)										
- How many poolees, per the Volume II definition, does the OST have?										
	Grnd	SNA	SNFO	Law	Res	Fem	AA	Hisp	Oth	Total
PLC										
PLC										
PLC										
OCC										
Notes:										

Programs Book		
	Yes	No
- Does the OST utilize the Programs Book Module in MCRISS-OSS?		
- Does the OST monitor the MCRC SharePoint site for the release of FROST Calls?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

- Does the OST have current copies of the OCM and Volume II?		
Notes:		

Prospect Board Module		
	Yes	No
- Is the OST using the Prospect Board in MCRISS-OSS to create leads for all contacts?		
- Is the OST using the Prospect Board in MCRISS-OSS to generate and maintain all Prospect Applicant Cards per the Volume II?		
- Is the OST completely filling out all PACs?		
- Is the OST entering notes on all PACs and scheduled follow-ups to enable any member of the OST to systematically work the PAC?		
- Do PACs document all contact with prospects and applicants?		
- Are all PACs in the Prospect Board Module action dated for their next follow-up, appointment, etc.?		
- PAC generation: <div style="margin-left: 40px;">- Total # of PACs OST made for the month of _____:</div> <div style="margin-left: 100px;">- Total # of workdays in the month:</div> <div style="margin-left: 40px;">- Total # of members present in the OST during the month:</div> <div style="margin-left: 80px;">- PACs made / workdays = _____ PACs made per day:</div> <div style="margin-left: 80px;">- PACs made per day / # of OST members:</div>		
Notes:		

Training File		
	Yes	No
- Does the OSO maintain records of all internal training for both the OSO and OSA in the Training File Module of MCRISS-OSS?		
- Does the OSO maintain a hard-copy training record for the HRA?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

- Has the RS conducted the OSO's 3, 6, 9 mos MOJT and documented the training?		
- Has the District conducted the OSO's 3, 6, 9 mos Evaluation and documented the evaluation?		
- Does the OSO/RI maintain records of all quarterly training requirements in MCRIS-OSS per the Volume II?		
Notes:		

Profile Progress Data		
	Yes	No
- Does the OSO maintain Profile Progress Data for three years?		
- Does the OSO utilize the Profile Progress Data during annual planning?		
Notes:		

Processing		
	Yes	No
- How long does the OST give applicants to return the rough application?		
- How often does the OSO conduct OSS meetings?		
- How does the OSO drive production?		
- What issues does the OST have administering the ASTB-E or processing applicants for NAMI?		
- What issues does the OST have with MEPS or DODMERB?		
- Does the OST forward all medical exams to the District Corpsman to analyze and complete the MCRC Medical Checklist prior to contracting?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

- What issues does the OST have with processing waivers?		
- Have the OSO explain what he/she checks to ensure an applicant is qualified for the program which they are applying prior to contracting the applicant. Notes:		
- What is the OST's average contact-to-contract time?		
- What issues does the OST have processing FAP/MCTAP applications?		
- Does the OST have two MCMEDs accounts as required to process candidates on LOD?		
- How does the OST track when candidates' HIV, dental, PAP, and annual certifications are due?		
- How does the OST track when RFAs are due? Does the OST conduct back-planning for aviation candidates requiring NAMI qualifications?		
Notes:		

Shipping / OCS Preparation		
	Yes	No
- Does the OST conduct a Pre-OCS Training Event and Warrior's Picnic as required per the Volume II?		
- How does the OSO physically and mentally prepare candidates for OCS? Have the OSO describe the pool program.		
- How does the OST handle courtesy shippers?		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Notes:

Commissioning		
	Yes	No
- Does the OSO understand commissioning ceremony procedures?		
- Does the OSO understand the OST's requirements following commissioning? (e.g. forwarding documents to MCRC)		
Notes:		

Systematic Recruiting		
	Yes	No
- Is the OST working systematically?		
Final Comments:		

SYSTEMATIC RECRUITING INSPECTION (SRI) CHECKLIST

Item	Yes	No	Comments
1. Recruitment process is documented and approved by the appropriate authority.			
2. Recruitment process is transparent and fair.			
3. Recruitment process is based on merit and qualifications.			
4. Recruitment process is free from bias and discrimination.			
5. Recruitment process is based on the needs of the organization.			
6. Recruitment process is based on the needs of the community.			
7. Recruitment process is based on the needs of the country.			
8. Recruitment process is based on the needs of the world.			
9. Recruitment process is based on the needs of the future.			
10. Recruitment process is based on the needs of the present.			
11. Recruitment process is based on the needs of the past.			
12. Recruitment process is based on the needs of the future, present, and past.			

THIS PAGE INTENTIONALLY LEFT BLANK

OSO MOJT CHECKLIST AND EVALUATION SUMMARY

Name	Rank	SSN (last 4)	Date Joined	Date Training Completed
------	------	--------------	-------------	-------------------------

Instructions: Select the appropriate number via the dropdown under the month assessed:

- 1 - Can perform the task to the established standard.
2 - Cannot perform the task to the established standard.
3 - Was not evaluated on the task during the period.

Per Vol II, RI will complete the MOJT Section. AOP or District Representative will complete the Evaluation Section

[illegible]

OSO MOJT CHECKLIST AND EVALUATION SUMMARY

POOL / SHIPPING / PRODUCTION / OCS OVERVIEW

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
POOL STRENGTH												
MISSION												
NEW CONTRACTS												
POOL DISCHARGES												
OCS DISENROLLED												

THREE MONTH EVAL										TRNG REQ Y/N	
<u>DUTY AREA</u>										M=Mastery NM=Non Mastery	
Planning Recruiting Activities											
Conducting Recruiting Activities											
Working Systematic Recruiting Components											
Screening and Conducting Sales Interviews											
Preparing Enlistment Documents											
Analyzing Results of Recruiting Activities											
Administration and Logistics											

3 Month Evaluation Summary / Recommendations		
AOP/District Rep Signature	Marine Signature	Date

OSO MOJT CHECKLIST AND EVALUATION SUMMARY

POOL / SHIPPING / PRODUCTION / OCS OVERVIEW

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
POOL STRENGTH												
MISSION												
NEW CONTRACTS												
POOL DISCHARGES												
OCS DISENROLLED												

SIX MONTH EVAL	<u>DUTY AREA</u>	M=Mastery NM=Non Mastery	TRNG REQ Y/N
Planning Recruiting Activities			
Conducting Recruiting Activities			
Working Systematic Recruiting Components			
Screening and Conducting Sales Interviews			
Preparing Enlistment Documents			
Analyzing Results of Recruiting Activities			
Administration and Logistics			

6 Month Evaluation Summary / Recommendations		
AOP/District Rep Signature	Marine Signature	Date

OSO MOJT CHECKLIST AND EVALUATION SUMMARY

POOL / SHIPPING / PRODUCTION / OCS OVERVIEW

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
POOL STRENGTH												
MISSION												
NEW CONTRACTS												
POOL DISCHARGES												
OCS DISENROLLED												

NINE MONTH EVAL										TRNG REQ Y/N	
DUTY AREA										M=Mastery NM=Non Mastery	
Planning Recruiting Activities											
Conducting Recruiting Activities											
Working Systematic Recruiting Components											
Screening and Conducting Sales Interviews											
Preparing Enlistment Documents											
Analyzing Results of Recruiting Activities											
Administration and Logistics											

9 Month Evaluation Summary / Recommendations		
AOP/District Rep Signature	Marine Signature	Date

OSA MOJT CHECKLIST AND EVALUATION SUMMARY

Name	Rank	SSN (last 4)	Date Joined	Date Training Completed
<p>Instructions: Select the appropriate number via the dropdown under the month assessed:</p> <p>1 - Can perform the task to the established standard. 2 - Cannot perform the task to the established standard. 3 - Was not evaluated on the task during the period.</p> <p>Per Vol II, OSO will complete the MOJT Section. RI will complete the Evaluation Section unless the OSO is within the Evaluation Period.</p>				

MOJT Task	Vol II Ref	1 Mo	3 Mo	6 Mo	9 Mo	Date	Initials OSO	OSA
Prepare a Month-in-Sight Plan in MCRISS-OSS								
Prepare a Daily Schedule in MCRISS-OSS								
Prepare for Telephone Canvassing Activity								
Prepare for Area Canvassing Activity								
Prepare to Make a University/College Visit								
Analyze an Objective Sheet								
Prepare a University/College Profile Sheet in MCRISS-OSS								
Conduct Telephone Canvassing Activity								
Conduct Area Canvassing Activity								
Conduct a University/College Visit								
Handle Office Traffic Activity								
Work a Prospect Applicant Card in MCRISS-OSS								
Work an OPPC								
Work a University/College Visit Card in MCRISS-OSS								
Maintain a Pool Card in MCRISS-OSS								
Maintain a Contact Card in MCRISS-OSS								
Maintain OST Management Book in MCRISS-OSS								
Conduct Prospect/Application Screening								
Conduct a Sales Presentation with Sales Tools								
Analyze Results of Daily OSS Prospecting Activities								
Build a package in ACP								
Maintain Components of Systematic Recruiting								

OSA MOJT CHECKLIST AND EVALUATION SUMMARY

POOL / SHIPPING / PRODUCTION / OCS OVERVIEW

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
POOL STRENGTH												
MISSION												
NEW CONTRACTS												
POOL DISCHARGES												
OCS DISENROLLED												

THREE MONTH EVAL										TRNG REQ Y/N	
<u>DUTY AREA</u>										M=Mastery NM=Non Mastery	
Planning Recruiting Activities											
Conducting Recruiting Activities											
Working Systematic Recruiting Components											
Screening and Conducting Sales Interviews											
Preparing Enlistment Documents											
Analyzing Results of Recruiting Activities											
Administration and Logistics											

3 Month Evaluation Summary / Recommendations		
Recruiter Instructor Signature	Marine Signature	Date

OSA MOJT CHECKLIST AND EVALUATION SUMMARY

POOL / SHIPPING / PRODUCTION / OCS OVERVIEW

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
POOL STRENGTH												
MISSION												
NEW CONTRACTS												
POOL DISCHARGES												
OCS DISENROLLED												

SIX MONTH EVAL	<u>DUTY AREA</u>	M=Mastery NM=Non Mastery	TRNG REQ Y/N
Planning Recruiting Activities			
Conducting Recruiting Activities			
Working Systematic Recruiting Components			
Screening and Conducting Sales Interviews			
Preparing Enlistment Documents			
Analyzing Results of Recruiting Activities			
Administration and Logistics			

6 Month Evaluation Summary / Recommendations		
Recruiter Instructor Signature	Marine Signature	Date

OSA MOJT CHECKLIST AND EVALUATION SUMMARY

POOL / SHIPPING / PRODUCTION / OCS OVERVIEW

	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	June	July	Aug
POOL STRENGTH												
MISSION												
NEW CONTRACTS												
POOL DISCHARGES												
OCS DISENROLLED												

NINE MONTH EVAL										TRNG REQ Y/N	
DUTY AREA										M=Mastery NM=Non Mastery	
Planning Recruiting Activities											
Conducting Recruiting Activities											
Working Systematic Recruiting Components											
Screening and Conducting Sales Interviews											
Preparing Enlistment Documents											
Analyzing Results of Recruiting Activities											
Administration and Logistics											

9 Month Evaluation Summary / Recommendations		
Recruiter Instructor Signature	Marine Signature	Date

GLOSSARY

Activity. The Activity is the prospecting activity used to make the "Initial Contact" with an individual. There are four activities used in systematic recruiting: Telephone Call (TC), Digital Communication (DC), Area Canvass (AC), and Office Traffic (OT). Subsequent contacts with prospects are not counted as prospecting activities unless 12 months or more have passed since the last contact date.

Activity Objectives. Based on the last 12-months of data analysis, Activity Objectives are the number of AC, TC, DC, and OT contacts an OST needs to meet the monthly/weekly IO. Since the SOE tells the OSO how many contacts are necessary for it to obtain an interview for each activity, and the BP provides the percentage of interviews produced by each prospecting activity, the activity objectives can be determined by multiplying the monthly IO by the applicable SOE and the BP. It is important to note that office traffic is a passive activity. The OST has limited effects on OT; for this reason it is strongly recommended OSTs set higher TC, DC, and AC activity objectives to compensate for the unpredictability of OT.

Applicant. An applicant is an individual who has committed to applying for the officer programs, but has not yet been selected to attend OCS.

Appointment. The criterion for an appointment is met when the prospect agrees to meet with the OSO, at a specific time and date to discuss commissioning programs. This criterion meets the definition for an appointment whether the prospect shows for the appointment or not.

Area Canvass (AC). Area Canvassing (AC) is meeting likely prospects face-to-face, and obtaining their names and sufficient contact information for the purpose of gaining an appointment. For a prospect to count as an AC contact, the OST must have sufficient information to conduct a follow-up; always attempt to get a name, phone number, and e-mail address. Once contact is made, the OSO will document the individual's contact information in MCRISS-OSS.

Bad Lead. The OST will mark a lead a "bad lead" when the prospect does not meet all of the above requirements to be considered a good lead.

Business Percentage (BP). The BP shows the relative weight, or value, of each of prospecting activity; where is the OST's business coming from? AC, TC, DC, OT? The BP is the percentage of total interviews an OST held as a result of one of the four prospecting activities.

Candidate. A candidate is an individual who has contracted for a selection board. The OST will refer to individuals as candidates from the time they contract for a selection board until they receive their commission.

Closing Ratio (CR). The CR is the number of interviews it takes the OST to obtain one New Working Applicant. The CR is calculated by dividing the number of interviews an OST has conducted by the number of NWA's it generated. Always round up to the next, or higher 1/10th, (e.g., 3.33 = 3.4). The CR demonstrates the OST's effectiveness at conducting sales presentations.

Contract. An individual is qualified (based on the requirements for contracting in accordance with the OCM), has signed all required documents, and has been given the oath of enlistment by the OSO. [To apply for the PLC or OCC program, civilian applicants must sign a DD4, Enlistment/Reenlistment Document, enlisting in the Individual Ready Reserves (IRR).]

GLOSSARY

Contracting Objective. The monthly contracting objective will change throughout the recruiting year. The key to establishing the contracting objective is back planning. Once an OSO has received their mission, they will need to consider several factors when determining contracting objectives. Factors to consider include: the timing of the selection boards, phase lines, and university schedules.

Digital Communication (DC). Digital Communication (DC) as a prospecting activity is defined as the act of contacting a prospect via any social media or electronic medium platform with the intent to schedule an appointment. This includes all social media or electronic medium such as Facebook, e-mail, texting, OPPCs, etc. Contact with a prospect via social media and electronic medium is only counted the first time an OSO makes contact with the prospect.

Good Lead. A good lead is defined as an individual the OST is able to contact via phone or email who meets minimum officer program requirements in the following categories: age, academic testing (SAT, ACT, or ASVAB), education (e.g. graduated from a regionally or nationally accredited university or is full-time enrolled), and GPA.

Guest. A guest is an individual who attends a pool function and has not committed to applying for an officer program; this term specifically applies to Hold Harmless Agreements addressed in Chapter 16.

Interview. A face-to-face meeting with an individual, who has been screened, found to be basically qualified, and is given a full sales presentation using benefit tags (basically qualified is defined as an applicant who has a more than reasonable chance of contracting during the current FY). Whether or not the prospect says, "yes" to a commissioning program, does not matter; if the prospect is basically qualified, and a sales presentation is conducted, it is counted as an interview.

Interview Objective (IO). Based on the data analysis and the contracting objective, this is the number of interviews the OST needs to conduct to meet the monthly contracting objective. Since the SR is defined as the number of interviews it takes to write one contract, the IO is determined by multiplying the SR by the Contracting Objective.

New Working Applicant (NWA). An NWA is defined as an individual who meets the minimum requirements for mental, moral, medical and physical screening, has been given a sales presentation, and is scheduled to move forward with the next step(s) toward becoming an officer (screened, sold, and scheduled). NWAs are declared and documented in MCRISS-OSS/OS prior to processing and contracting. Having a qualified mental score or physical qualification is not necessary to declare an NWA. An individual counts as an NWA only one time during a 12-month period, and will be counted as an NWA a second time only if more than 12 months have passed since the last declaration. If 12 or more months have lapsed since the NWA was previously declared, and the NWA is beginning an application for a new selection board, the NWA will need to be reentered into MCRISS-OSS as a lead/PAC/appointment/interview and re-declared as an NWA in order for the NWA to count toward the current mission year.

New Working Applicant Objective (NWA Objective). Based on the data analysis, the NWA Objective is the number of NWAs the OST needs to declare to write the number of contracts assigned for the upcoming month. Since the IO projects the number of interviews required to meet the assigned contract mission, and

GLOSSARY

the CR is defined as the number of interviews required to produce one NWA, the monthly NWA Objective can be determined by dividing the monthly IO by the CR.

Not Workable. The OST will mark a lead as "not workable" when the prospect meets the age and education requirements to apply for an officer program, but cannot apply due to being physically, medically, or morally unqualified.

Office Traffic (OT). Office Traffic (OT) as a prospecting activity is defined as those individuals, who walk in, call in, contact an OST through social media or an electronic medium, or are brought by others to an OSO's office to discuss officer programs for the first time.

Poolee. An individual is a poolee after they sign their DD4 (Enlistment Document) and take the oath of enlistment. Lieutenants awaiting TBS are members of the pool; therefore, the OSO will occasionally see lieutenants referred to as a poolee.

Processing Ratio (PR). The PR is the number of NWA's it takes the OST to contract one applicant. The PR is calculated by dividing the total number of NWA's an OST has declared by the number of contracts the OST has generated. Always round up to the next, or higher 1/10th, (e.g., 3.33 = 3.4). The PR demonstrates the OST's effectiveness in the screening process and the skills necessary to gain, and maintain, commitment.

Source (SRC). The source is the agency or program that produced the lead.

Standard of Effectiveness (SOE). A SOE is calculated for each recruiting activity (AC, TC, DC, OT). It is calculated by dividing the total number of a contacts for each individual recruiting activity an OST has attained by the number of interviews generated from that particular activity. When figuring out SOEs, always round up to the next or higher whole number, (e.g., 3.6 = 4 or 5.4 = 6).

Telephone Call (TC). An OST records a contact with a TC activity when the OST initiates a call with a prospect from a list, with the intent to schedule an appointment to discuss commissioning programs. A telephone contact is only counted the first time a prospect is contacted, and is counted regardless of whether or not the contact results in an appointment. All subsequent contacts are follow-ups.

Workable. The OST will mark a lead as "workable," if the prospect has a reasonable chance of applying for an officer program within the next year.

THIS PAGE INTENTIONALLY LEFT BLANK



MARINE CORPS

OFFICER PROGRAMS

ROUGH APPLICATION

OFFICER SELECTION STATION
123 MAIN STREET SUITE 543
ANYPLACE, USA 23456-5678

Applicant's Name:

Date Issued:

Date Due:

MARINE OFFICER PROGRAMS ROUGH APPLICATION

Congratulations on your decision to pursue an application for the Marine Officer Programs! The timely submission of this rough application is a good indicator of your genuine interest to pursue a commission as a Marine Corps Officer. These programs are very competitive and the number of openings available per category is limited; consequently, it is in your best interest to pursue the application process aggressively. If for some reason you are unable to complete the document by the date listed, please call to let us know when you will have it completed by.

The Officer Selection Team is here to facilitate the timely submission of your application and assist you through the process. From the time you make the decision to apply, we will provide the guidance necessary to enable you to complete the entire application process in time for submission to the Selection Board.

APPLICATION REQUIREMENTS

The Officer Selection Team will identify the specific requirements from the following list that are applicable to your situation and the Program for which you are applying.

ALL Applicants

- ☐ Rough Application (Attached)
- ☐ Original Birth Certificate
- ☐ Original Social Security Card
- ☐ Official Transcripts

Prior Military Applicants

- ☐ Original DD214 (Prior Service Applicants Only)
- ☐ Copy of Service Record Book (Prior Service/Reserve Marines Only)
- ☐ Copy of most recent Physical Examination
- ☐ Request for Conditional Release (Other Service Reservists Only)

Married Applicants

- ☐ Original Marriage Certificate
- ☐ Divorce Decree if applicable
- ☐ Original Dependent Birth Verification

ROUGH APPLICATION INSTRUCTIONS

This application may be typed or legibly handwritten in black ink. All forms contain instructions at the top of the page and most of them are self-explanatory; however, some additional guidance is required to ensure they are completed correctly and completely. All non-applicable areas should be marked as such. Ensure you read the additional instructions provided below before you attempt to complete the instructions. Contact the Officer Selection Team with any questions.

STATEMENT OF UNDERSTANDING

The Statement of Understanding explains the minimum requirements that must be met and maintained as an applicant. Sign and date where indicated. The OSO/OSA will sign as the witness.

FAMILY ORIENTATION & PREVIOUS APPLICATION FOR MILITARY SERVICE

If more space is required to completely answer questions, attach additional pages. A reasonable attempt should be made to fill out these sections accurately and completely. If unable to acquire requested information, write "unknown" in the appropriate field.

MARINE OFFICER PROGRAMS ROUGH APPLICATION

STATEMENT OF UNDERSTANDING

I understand that the Officer Selection Officer, and the personnel at the Officer Selection Station, screen and evaluate applicants for the U.S. Marine Corps Platoon Leaders Class (PLC) and Officer Candidates Class (OCC) programs. Final approval of my application is not made by the Officer Selection Officer, but rather by a panel of officers at the appropriate headquarters level. The only guarantees for either Program are outlined in writing and will be contained in Annexes B and C of my PLC or OCC Contract.

I understand I must have a full military physical examination, have and maintain a minimum of a 2.0 GPA, remain enrolled in school as a full-time student (12 credits), score at least 1000 on the SAT, 22 on the ACT (Math and English combined), or 74 AFQT on the ASVAB, meet minimum involvement standards with legal authorities, be within age standards for the desired program for which I am applying, pass a physical fitness test and be fully evaluated by the Officer Selection Officer before my application may be submitted. I understand there are minimum requirements and that academic, mental, moral and physical disqualifications cannot be waived.

I understand that for my application to be competitive, I must score a minimum of 225 points out of a possible 300 on the Physical Fitness Test, which is scored as follows:

Males

Pull-ups (maximum = 20, each is worth 5 points)	100 points
Crunches (maximum = 100 in 2 minutes, each is worth 1 point)	100 points
3-mile run (maximum = 18 minutes, one point deducted every 10 seconds)	100 points

Females

Flexed Arm Hang (maximum = 70 seconds)	100 points
Crunches (maximum = 100 in 2 minutes, each is worth 1 point)	100 points
3-mile run (max = 21 minutes, one point deducted every 10 seconds)	100 points

I understand that the completion and submission of this application does not commit me to any obligation and that this Program is competitive. This completed application provides the Officer Selection Officer the screening criteria necessary to consider my request for processing. I also understand that if I am fully qualified, the Officer Selection Officer is obligated to forward my completed application to the Board for consideration, but is not obligated to include a favorable recommendation on my behalf. I further understand that since the Officer Selection Officer will most likely have limited opportunity to observe me, his/her recommendation to the Board will largely be based upon his/her interaction with me during the application process combined with observations made by the rest of the Officer Selection Team.

(Applicant's Signature & Date)

(Witness Signature & Date)

MARINE OFFICER PROGRAMS ROUGH APPLICATION

PROGRAM (Check One)

☐

PLC

GRD

☐

PLC

AIR

☐

PLC

NFO

☐

PLC

LAW

☐

OCC

GRD

☐

OCC

AIR

☐

OCC

NFO

☐

OCC

LAW

☐

OCC

RES

APPLICANT INFORMATION		
Name (Last, First, Middle):		
Social Security Number:		Date of Birth:
Place of Birth (City, County, State):		
CURRENT/SCHOOL CONTACT INFORMATION		
Address While at School (Number, Street, Apartment)		
Address While at School (City, County, State, ZIP)		
Current Residence Phone Number:	Cell Phone Number (if applicable):	Email Address 1:
HOME OF RECORD CONTACT INFORMATION		
Home Address (Number, Street, Apartment):		
Home Address (City, County, State, ZIP)		
Home Phone Number:		
PERSONAL INFORMATION		
Height:	Weight:	Vision (if known):
Sex:	Race:	Ethnic Category:
Marital Status:	Number of Children (if applicable):	Religious Preference:

MARINE OFFICER PROGRAMS ROUGH APPLICATION

CURRENT EDUCATION				
College Attend or Currently Attending:			Last Semester GPA:	Cumulative GPA:
Class Standing (Fr, So, Jr, Sr):		Degree Pursuing / Attained (BS, BA, MS, MA, MBA):		
Projected Graduation Date:		Declared Major:		
ACT SCORES	Composite:	Math:	English:	
SAT SCORES	Composite:	Math:	English:	
LSAT SCORES	Composite:			
OTHER COLLEGES				
Other College # 1:		From Date:	To Date:	Graduate (Y or N):
Mailing Address:				
Other College # 2:		From Date:	To Date:	Graduate (Y or N):
Mailing Address:				
Other College # 3:		From Date:	To Date:	Graduate (Y or N):
Mailing Address:				
HIGH SCHOOL				
High School	Mailing Address:			Graduation Year:
PRIOR MILITARY SERVICE				
Branch:	Grade/Rank:	Date Enlisted:	Date Discharged:	RE Code:
Last Unit Served With:				
Previous Units:				

MARINE OFFICER PROGRAMS ROUGH APPLICATION

FAMILY INFORMATION				
Father's Name:	Address:			U.S. Citizen (Y or N)
Father's Date of Birth:	Father's Place of Birth:			
Mother's Name:	Address:			U.S. Citizen (Y or N)
Mother's Date of Birth:	Mother's Place of Birth:			
Spouse's Name:	Address:			U.S. Citizen (Y or N)
Child # 1's Name (if applicable):	Address:			U.S. Citizen (Y or N)
Child # 2's Name (if applicable):	Address:			U.S. Citizen (Y or N)
Child # 3's Name (if applicable):	Address:			U.S. Citizen (Y or N)
MEDICAL INSURANCE INFORMATION				
Insurance Company:	Address			Policy Number
FAMILY MEMBERS WITH MILITARY SERVICE				
Name	Relationship	Branch of Service	Rank	Period of Service
Name	Relationship	Branch of Service	Rank	Period of Service
Name	Relationship	Branch of Service	Rank	Period of Service

MARINE OFFICER PROGRAMS ROUGH APPLICATION

PLEASE ANSWER THE FOLLOWING QUESTIONS:

YES / NO

☐ ☐ Have you ever been, or are you now a member of any ROTC or other officer training program?

☐ ☐ Have you ever failed any type of military flight training?

☐ ☐ Have you ever been rejected for enlistment or induction into any branch of the Armed Forces? If yes, provide the date, branch and reason for rejection.

Date	Branch	Reason

☐ ☐ Do you now, or have you ever held a security clearance? If so, provide the date, type and basis for why you held it.

Date	Type	Basis

☐ ☐ Have you ever claimed, or been granted a pension, disability allowance, compensation or retired pay from the U.S. Government?

PREVIOUS OFFICER PROGRAMS

Complete if you previously applied for or participate (d) in any officer program including high school Junior ROTC (JRRTC).

Branch _____ Training Unit _____

Training Unit Address _____

Program Type (OCS, ROTC, Service Academy, etc.) _____

Specific Type Training (Pilot, Supply, Infantry, etc.) _____

Date Entered Program _____ Date Disenrolled _____

Date Scheduled for Commission (If training was successfully completed) _____

ROTC Scholarship (Circle all that apply)

Beginning Date _____ Ending Date _____

I DID / DID NOT apply. I was CHOSEN / NOT CHOSEN. I DID / DID NOT accept.

I VOLUNTARILY / WAS INVOLUNTARILY disenrolled. I AM / AM NOT still on scholarship.

I ONLY PARTICIPATED & WAS NEVER on scholarship. I STILL PARTICIPATE with the unit.

MARINE OFFICER PROGRAMS ROUGH APPLICATION

PERSONAL REFERENCE PAGE. To be eligible for this Program, you must complete the Section labeled "Required References." The additional references are afforded to allow you a better chance of selection. They are highly encouraged but not required. Do not use relatives, girlfriends/boyfriends, or roommates for the below two required "Other" References.

REFERENCES				
Dean (Req)	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Professor #1 (Req)	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Professor #2 (Req)	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Employer #1 (Req)	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Employer #2 (Req)	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Other (Req)	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Other	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Other	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Other	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email
Other	Official Title	Last, First, MI	Complete Mailing Address	Phone/Email

MARINE OFFICER PROGRAMS ROUGH APPLICATION

ACTIVITIES AND ACHIEVEMENTS PAGES. The next three pages are allotted for you to list the activities you participated in and the recognitions you received while in high school, college and outside of school. Please list everything you can think of. The OSO will determine what is relevant and what is not. Examples of school activities: sports, student government and fraternities/sororities. Examples of non-school affiliated activities: Boy/Girl Scouts, 4-H, Community Service Organizations. Examples of recognitions: All-Conference, State Championships, Student President, Valedictorian, Eagle Scout, and Honor Rolls. Applicants are encouraged to attach their current resume.

HIGH SCHOOL ACTIVITIES AND RECOGNITIONS	
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION

MARINE OFFICER PROGRAMS ROUGH APPLICATION

COLLEGE ACTIVITIES AND RECOGNITIONS	
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
NON-SCHOOL AFFILIATED ACTIVITIES AND RECOGNITIONS	
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION
YEAR	ACTIVITY OR RECOGNITION

MARINE OFFICER PROGRAMS ROUGH APPLICATION

EMPLOYMENT DATA

List all Periods of Employment that you have had:

[illegible]

Describe any job position where you were given special trust and confidence, or any management experiences you have had:

[illegible]

MARINE OFFICER PROGRAMS ROUGH APPLICATION

TRAFFIC OFFENSES. List all traffic violations in the format provided below. If you are unsure of any information, or if you have questions regarding this form, please contact the Officer Selection Team. Note: Alcohol-related traffic offenses are **NOT** considered minor infractions and should be explained in detail in the NON TRAFFIC ARREST Section on the following page.

FIRST OFFENSE
Month and year of violation
City & State where violation occurred
Original Charge
Charge of which convicted or a guilty plea was entered
Penalty or disposition. If fined, indicate amount.

SECOND OFFENSE
Month and year of violation
City & State where violation occurred
Original Charge
Charge of which convicted or a guilty plea was entered
Penalty or disposition. If fined, indicate amount.

THIRD OFFENSE
Month and year of violation
City & State where violation occurred
Original Charge
Charge of which convicted or a guilty plea was entered
Penalty or disposition. If fined, indicate amount.

FOURTH OFFENSE
Month and year of violation
City & State where violation occurred
Original Charge
Charge of which convicted or a guilty plea was entered
Penalty or disposition. If fined, indicate amount.

FIFTH OFFENSE
Month and year of violation
City & State where violation occurred
Original Charge
Charge of which convicted or a guilty plea was entered
Penalty or disposition. If fined, indicate amount.

SIXTH OFFENSE
Month and year of violation
City & State where violation occurred
Original Charge
Charge of which convicted or a guilty plea was entered
Penalty or disposition. If fined, indicate amount.

MARINE OFFICER PROGRAMS ROUGH APPLICATION

DRUG STATEMENT. List any experimentation with illegal substances in this section. If this does not apply to you, please indicate so by writing, "N/A."

Type of drug used:
Approximate number of times:
Amounts taken:
Method(s) used:
Inclusive Dates (be specific):
Were you ever convicted of or arrested for this drug use?
Circumstances under which the drug use occurred (use additional sheets if necessary):

Type of drug used:
Approximate number of times:
Amounts taken:
Method(s) used:
Inclusive Dates (be specific):
Were you ever convicted of or arrested for this drug use?
Circumstances under which the drug use occurred (use additional sheets if necessary):

MARINE OFFICER PROGRAMS ROUGH APPLICATION

NON-TRAFFIC ARREST FORM. This form is to be utilized if you have ever been charged, cited or apprehended with and/or convicted of any alcohol-related offense, or any other non-traffic arrest no matter how minor. Answer the following questions and write a concise, but complete statement addressing the details of the incident.

Month & year of violation:
City and State where the violation occurred:
Original Charge:
Charge of which convicted, or to which a guilty plea was entered:
Penalty or disposition. If fined, indicated amount:
Applicant's Statement addressing the circumstances surrounding this incident (use additional sheets if necessary):

Month & year of violation:
City and State where the violation occurred:
Original Charge:
Charge of which convicted, or to which a guilty plea was entered:
Penalty or disposition. If fined, indicated amount:
Applicant's Statement addressing the circumstances surrounding this incident (use additional sheets if necessary):

MARINE OFFICER PROGRAMS ROUGH APPLICATION

100 WORD STATEMENT. Using a BLACK INK PEN, write a statement explaining why you want to become a Marine Corps Officer. Penmanship must be legible! Apply correct use of grammar and style. Make sure you check your spelling. Your statement should be between 90 to 100 words, but CAN NOT EXCEED 100 WORDS!

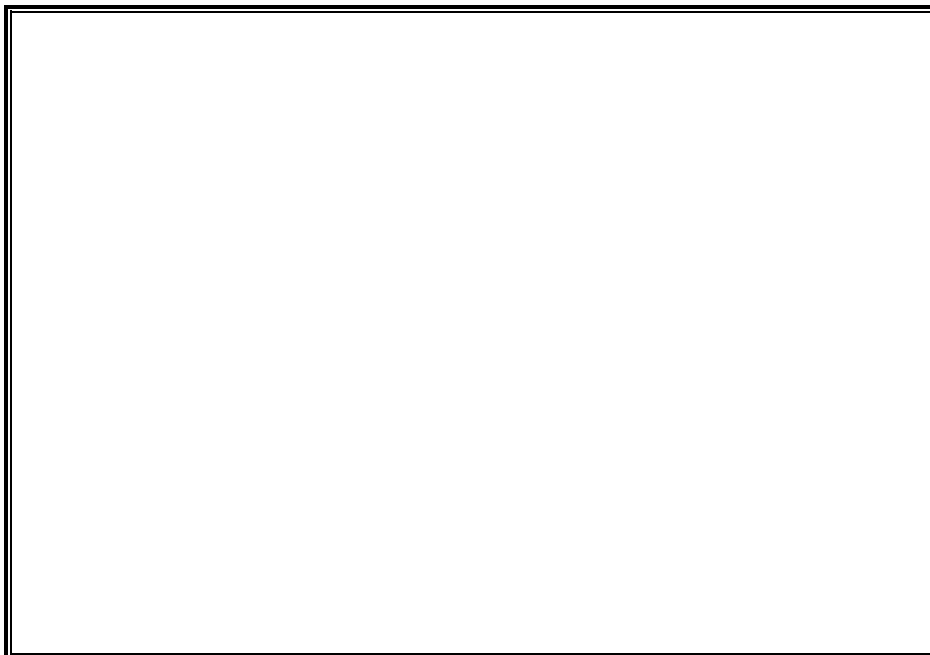
This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

Applicant's Signature

MARINE OFFICER PROGRAMS ROUGH APPLICATION

TATTOO DIAGRAM AND STATEMENT:

Provide a detailed statement describing your tattoo: What is the tattoo? Where is it? How big is it? Why did you get it, and what does it mean to you?



MARINE OFFICER PROGRAMS ROUGH APPLICATION

PRIVACY ACT STATEMENT

The authority to request this information is contained in Section(s) 505, 508, and 510 under Title 10 of the United States Code; which prescribes qualifications for enlistment into the Armed Forces of the United States.

The information you provide will only be released to authorized personnel involved in the selection process of your application. Any and all information acquired is **FOR OFFICIAL USE ONLY** and will be maintained in accordance with Federal Law.

Any and all information acquired by this office whether by telephone or in writing will be used to determine your suitability as a Marine Corps Officer.

1. I authorize the Department of Defense, its persons and or agencies, full authority to release any and all personal information contained herein, to include any information that may be acquired during the application process, for the purposes of selection to the program for which I am applying.
2. I acknowledge receipt, and declare full understanding of the above statements.

(Signature of Applicant)

(Date)

(Social Security Number)

ACKNOWLEDGMENT STATEMENT

I CERTIFY THAT THE INFORMATION PROVIDED BY ME IN THIS APPLICATION IS TRUE, ACCURATE AND COMPLETE TO THE BEST OF MY KNOWLEDGE, AND IS MADE IN GOOD FAITH. I UNDERSTAND THAT MAKING A KNOWINGLY FALSE STATEMENT MAY RESULT IN A FRAUDULENT ENLISTMENT, WHICH CAN CARRY A FINE OR PERIOD OF IMPRISONMENT, OR BOTH. (U. S. CODE, TITLE 18, SECTION 1001):

SIGNATURE

DATE

THIS PAGE INTENTIONALLY LEFT BLANK

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

Prior to Contracting in ACP

1. Prior to contracting an applicant, the OST must take several steps to verify the applicant meets contracting requirements as well as to prepare the applicant's record for contracting.

2. The HRA often performs several of the following tasks; however, it is the OSO's responsibility to ensure each applicant is fully qualified for contracting, and to Quality Control Check (QC) each applicant's package.

a. Prior to scheduling an applicant to contract, the OSO must verify the following:

(1) Applicant possesses current medical qualifications *for the appropriate program* (MEPS, DODMERB, NAMI as applicable); OST has signed MCRC Medical Checklist from the District Corpsman

(2) Applicant has ran PFT within 30 days of contracting

(3) OST possesses Certified True Copy (CTC) of social security card, birth verification (and dependents as applicable, to include marriage license)

(4) OST possesses current and certified transcripts

(5) OST possesses certified copy of mental qualifiers for the appropriate program (e.g. SAT/ACT/ASVAB, ASTB-E, LSAT as required)

(6) OST possesses NAVMC 10469, Academic Certification Form (ACF). The ACF must be certified by an appropriate school official. The OST must pay special attention to the Applicant's expected graduation date and ensure the OST is planning to contract the applicant for the appropriate program.

(7) All waivers are approved (as required)

(8) In addition to the above, the OSO must ensure the OST possesses program specific requirements for contracting (e.g. law school acceptance letter for college seniors applying for PLC Law; proof of admittance to practice law for OCC Law applicants; additional medical requirements for all aviation applicants; etc.)

b. Once the OSO has verified the information above and the OST schedules the applicant to contract, the HRA often conducts the following actions in MCRISS-OSS/OS prior to preparing contract documents in ACP. Some information from MCRISS-OS auto-populates forms in ACP. The HRA will verify the following in MCRISS-OS. MCRISS-OS pulls information from MCRISS-OSS; therefore, if information is inaccurate in MCRISS-OS, it is because the information is inaccurate in MCRISS-OSS. It may be necessary for the HRA to change information in MCRISS-OSS to get accurate information in MCRISS-OS. The following ***MUST BE VERIFIED AS ACCURATE PRIOR TO CLICKING THE CONTRACT BUTTON ON THE NWA TAB IN MCRISS-OS:***

(1) Name is spelled correctly & SSN is correct

(2) Mission Year Working For

(3) Program

(4) Training Type

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

(5) FY

(6) Class/Increment

(7) Projected Comm FY

(8) Bachelor Grad Month and Year

(9) Race, Ethnicity, MEPCOM Race Category, MEPCOM Ethnic Category (If an applicant meets requirements for multiple race/ethnicities, the OST should ensure all categories reflect the race/ethnicity the OST desires to receive credit for).

(10) Current PFT score/Ht/Wt

(11) Current Address and Home of Record

(12) The OST must also verify all information is entered accurately in the following tabs on the NWA tab: Exams, Education, Waivers, Dependents, Prior Service, Legacy/Special Interest (e.g. female pull-ups). See the information below for notes regarding the aforementioned tabs:

(a) Waivers. If an applicant is a resubmit, the applicant's waivers must be reentered in MCRISS and approved at the appropriate level. The waiver may still be good depending on the date the waiver was originally approved; it simply needs to be documented in the applicant's MCRISS-OS record for the selection board.

(b) Prior service affects the PEBD of the applicants

ACP

1. ACP provides the OST with the means to initiate, process, and submit applications in an electronic format by "importing" and "exporting" the applicant's record. Not all applicants require all forms to be completed. OSOs will complete only the program-specific forms necessary for the contract and will use the electronic checklist provided in ACP. The checklist shows all forms that have been created and whether or not they have been completed. It is imperative that OSOs determine the appropriate forms required for each applicant using MCRCO 1100.2, the Officer Commissioning Manual, and create them in ACP. Because each applicant's situation is different, it is impossible to cover all possible situations in this guidebook; the OST must use the OCM as a reference.

2. When completing forms in ACP, some fields will auto-populate while others require data entry. Fields requiring data entry will always be distinguished from fields that are auto-populated. Some fields designated for data entry may auto-populate if the information was provided from another "source" (e.g. MCRISS-OS). It is imperative that end users take care in ensuring that all fields are accurate, regardless of whether or not they auto-populate. It is important to note that some documents will require manual uploading in ACP.

3. ACP Tips:

a. Save after signing every document and print a copy for the candidate record book.

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

b. If you open an ACP document and the screen is red and blue script, contact your IT section to have your "Adobe Handler" reset; this occasionally occurs following updates.

c. If you receive an "error message" when switching between forms, click cancel, close the program, and re-open it. All unsaved data will be lost - save after completing every form.

d. Check for updates every couple weeks.

e. Double-click the applicants name after downloading. The user can change the OSO, address, etc. The user may have to upload the applicant's package and then re-download, or re-create documents, to enable changes to take affect.

f. Create a MEPCOM 680 for each applicant. Fill out the Home of Record, race/ethnicity, and save the document. The data from this form auto-populates other forms. The user may have to upload the applicant's package and then re-download, or re-create documents, to enable changes to take affect.

g. To create documents, double-click the folder in which you want to create documents.

h. ACP pulls some data from MCRISS-OS to populate forms. Conversely, the following ACP documents populate the MCRISS-OS Board View for selection boards: the photo, the 100 word essay, and the NAVMC 124 (OSO Eval).

4. The following *IS NOT* an exhaustive list of all required contracting documents. The following is meant to serve as a reference for some basic instructions, common mistakes, and requirements and forms common to all applications.

a. Medical

(1) Upload current physical qualification. (MEPS - 2807-1, 2807-2, 2808; DODMERB - 2351, 2492, DODMERB PE; MCRC Medical Checklist; Annual Certifications, HIV results, PAP results, Dental form; NAMI PQ; Anthropometric Measurements; eye surgery documents; all as required).

(2) USMC PFT Scores Worksheet. The OSO must sign the PFT sheet to verify the score. The score on the PFT sheet must match the contracting PFT. All other PFTs will be entered in MCRISS-OS.

(3) Level of Activity Statement. Required for all applicants.

(4) DD 2005, Privacy Act Statement - Health Care Records. Required for all applicants.

(5) SOU Dental Requirements. Required for all applicants.

b. Orders

(1) NAVMC 10468, Request for Orders. Required for all applicants; the OST will submit this form to the District to request orders after the candidate is selected.

c. Financial. Not used during contracting.

d. Contracts

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

- (1) OSTs will upload certified true copies of the social security card and birth verification. (Dependents as required)
- (2) Statement of Conditional Enlistment (Annex B). Required for all applicants. Ensure program is accurate.
- (3) NAVMC 11000, Data Required by the Privacy Act of 1974. Required for all applicants.
- (4) SOU Fraternization. Required for all applicants.
- (5) NAVMC 11494, Service Member's Civil Relief Act Advice and Statement of Understanding. Required for all applicants.
- (6) DD 2058, State of Legal Residence Certificate. Required for all applicants.
- (7) DD 93, Record of Emergency Data. The DD93 must be completed with emergency contact and beneficiary information. Reference DD93 instructions for details on completing the form.
- (8) NAVMC 10418-2, Certificate of Reasons for Disenrollment. Required for all applicants. (Note - OSTs are required to update MCRISS-OS with current PFT scores and GPAs to track program eligibility).
- (9) Drug SOU. Required for all applicants.
- (10) Certification of Security Clearance Investigation. Not required until after the OST completes the SF-86 and fingerprints for the submission of the RFA.
- (11) Restrictions on Personal Conduct in the Armed Forces. Required for all applicants.
- (12) DD 4, Enlistment/Reenlistment Document. The OST will likely have to create this document by double-clicking the "contracts" folder.
 - (a) Marines currently serving in the SMCR or IRR. Applicants currently serving in the SMCR or IRR are not required to sign a new DD4. OST's will upload a copy of the Marine's original DD4 to ACP. OSTs will ensure Block 15 (Contract Date) on the NAVMC 10418, the service agreement, and the "Contract Date" block in MCRISS-OS on the Contract tab, reflect the Marine's original DD4 contract date.
 - (b) Other service applicants. Applicants currently serving on a contract for another service, either the active or reserve component, will not sign a DD4 until the applicant initiates contractual obligations with the Marine Corps (which is the date the candidate reports to OCS). Applicants may not fulfill two contracts concurrently; for this reason, the OST will not have the applicant sign a DD4 at the time of "contracting." The OST must possess the completed DD 368, Request for Conditional Release, prior to contracting the applicant in MCRISS-OS and submitting the applicant to the selection board. The OST will upload a copy of the candidate's DD 368 to ACP and ensure the MCRISS-OS "Contract Date," the service agreement, and Block 15 on the NAVMC 10418, reflect Marine Corps contract date (the date the candidate will report to OCS). Once selected, as part of the shipping preparation, the OSO will prepare a DD4 with the date the candidate is scheduled to report to OCS. Additionally, the OST will forward the DD 368 to the appropriate service indicating that contractual obligations begin with the Marine Corps on the date the candidate reports to OCS.

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

(13) SOU MCPSASH, Statement of Understanding Marine Corps Policy on Sexual Assault and Sexual Harassment (Annex A). Required for all applicants. The OST will likely have to create this form.

(14) Service Agreement. Applicants will only sign one service agreement and it will be for the appropriate program for which the applicant is applying. Required for all applicants. The OST will likely have to create this form. (Forms NAVMC 10460, 10461, 11440, 10698, etc.)

(15) SOU Accession to Active Duty (Annex D). Required for all applicants but not currently in ACP. OST must sign hard-copy and upload certified copy to ACP.

(16) Additional documents the OST may be required to upload in the contracts folder include: citizenship documents, DD 368 - Conditional Release, DD 214 - Certificate of Release or Discharge, Officer Financial Statement for dependents, etc.

e. Academics

(1) NAVMC 10469, Academic Certification Form (ACF). OSTs will upload certified copies of the ACF to this section.

(2) College Transcripts. OSTs will upload certified copies of transcripts from each college/university the applicant has attended.

(3) Mental Aptitude. OSTs will upload certified copies of appropriate mental qualifications. (e.g. SAT/ACT/ASVAB, ASTB-E, LSAT)

(4) Proof of Degree. OSTs will upload certified copies of proof the applicant has their degree (per MCRCO 1100.2 requirements).

(5) Additional documents the OST may be required to upload in the Academics folder include law school acceptance letters and state bar notifications.

f. Application

(1) Photo. The OST will include one photo of each applicant in appropriate business attire (SMCR candidate photos will be taken in the Service Charlie uniform).

(a) The photograph will be approximately 4" x 5", full-length, uncovered, front-view with left shoulder forward (similar to a promotion photo). Applicants who wear glasses will remove them prior to being photographed. The photo will be inserted in a Word document and the Word document will include the candidate's name, last-four, and date the photograph was taken per MCRCO 1100.2, OCM. The Word document will be saved as a PDF and uploaded to Photo folder.

(b) If an applicant is at, or over, their maximum height/weight, the OST will include a body fat photo page with the recorded body measurements and body fat percentage. (Refer to MCO 6110.3, Marine Corps Body Composition and Military Appearance Program for Marine Corps height/weight requirements).

(c) Include tattoo photos and body fat photos in the same PDF as the photo page. The uploaded PDF links to the "Photo" tab in the Board View in MCRISS-OS and is used for voting purposes on the selection board.

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

(2) 100 Word Essay. Applicants must write a 100-word essay stating why they are interested in a Marine commission. The intent of the essay is to evaluate the Applicant's communication ability, potential, and motivation for commissioning. When uploading the 100-word essay, the OST must upload additional documents such as PIQs, transcripts, waivers, etc. Refer to District/Region requirements for documents required in the 100 Word Essay folder. The uploaded PDF links to the "100 Word" tab in the Board View in MCRISS-OS and is used for voting purposes on the selection board.

(3) NAVMC 10418/NAVMC 10418-1, Application for Officer Programs. The NAVMC 10418 is the foundation of the officer application; every crucial piece of information pertaining to the applicant is found on this form. OSTs must ensure accurate data is entered on the NAVMC 10418/-1 (pg. 1 is the NAVMC 10418; pg.2 is the NAVMC 10418-1). OSOs must verify the following:

(a) Blocks 1-16 must be accurate and match certified documents and MCRISS-OS

(b) Block 15, Contract Date, must match the DD4 and MCRISS-OS

(c) Mental test scores must match certified documents and MCRISS-OS

(d) The NAVMC 10418-1 is used to explain any "yes" answers on the NAVMC 10418. OSOs must pay special attention to the screening questions on the NAVMC 10418 and reference MCRCO 1100.2, OCM, for questions concerning "yes" answers. OSTs will ensure the candidate's race and ethnicity match MCRISS-OS.

(4) Drug Statement. Required for all applicants. Ensure waivers are approved prior to contracting (as required).

(5) Minor Traffic Violations. Required for all applicants. Ensure waivers are approved prior to contracting (as required).

(6) Non-Traffic Arrest Form. Required for all applicants. Ensure waivers are approved prior to contracting (as required).

(7) DD 369, Police Record Check. All applicants are required to have a minimum of one DD 369 completed from their current residence. Additionally, police record checks are required for all police involvement with the exception of traffic offenses under \$500.

(8) Tattoo Screening Form. Required for all applicants but not currently found in ACP.

(9) SOU Marine Corps Officer Program Policy Concerning Tattoos, Branding, and Ornamentation. Required for all applicants.

(10) NAVMC 124, Officer Selection Evaluation. The OSO Evaluation links to the Board View in MCRISS-OS and is used for voting purposes on the selection board. The OSO Eval must be created and signed in ACP for the link to work. When rating applicants, the OSO should consider the whole person concept and the applicant's potential to serve as a commissioned officer. The OSO should evaluate applicants truthfully and avoid inflating rankings.

(11) NAVMC 10064, Personal Information Questionnaire (PIQ). At a minimum, the OST is required to obtain five PIQs for each applicant:

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

(a) Dean. The OST is required to obtain a PIQ from the Dean of the institution which the applicant is currently enrolled. The OST may obtain a PIQ from a comparable official who has access to the applicant's disciplinary record on campus.

(b) One Professor.

(c) One Employer.

(d) Two others (non-relatives).

(e) If the applicant is a member of the SMCR, the OST is required to obtain a PIQ from the CO or I&I of the SMCR unit.

(12) In addition to all of the documents listed previously, if applicable, the OST will include the following in the Application folder: waiver packages, DD 785 - Record of Disenrollment from Officer Candidate-Type Training, tattoo photos, BCP photos, etc.

MCRISS-OS Contracting Process After Completing ACP Contracting

1. The following are steps the OST must take to contract applicants in MCRISS-OS. After contracting applicants in MCRISS-OS, the several sections of the applicant's record are "greyed out" and the OST is unable to alter the information. *It is essential that OST's perform the steps in the section "Prior to Contracting in ACP" before clicking "Contract Applicant" on the NWA tab in MCRISS-OS.*

2. After verifying the accuracy of ALL information on the NWA tab in MCRISS-OS, the OST will click the "Contract Applicant" button at the bottom of the NWA tab.

3. After the Contract tab appears, the OST must take the following steps to complete the 'recording' and 'submission' of the contract in MCRISS-OS to the District:

a. Change "Disposition" to "Submitted to District." (*Note: when the OST submits the contract to the District, the application package must be complete.)

b. Ensure the MCRISS-OS "Contract Date" matches the DD 4 and the NAVMC 10418.

c. Enter the date "Mailed to District." (This is the date the OST is submitting the contract to the District, the OST is not actually sending anything to the District. The District is able to view all documents in ACP after the OST uploads the applicant's record.)

d. Enter the Applicant's "Current GPA" on the Contract tab.

e. Enter the Applicant's "Projected Grad Date."

f. Enter the Applicant's "Projected Comm Date." This date must match the projected graduation date on the NAVMC 10418.

g. The OST must schedule the applicant for OCS by clicking the "OCS History" button. OSTs must enter the Pay Entry Base Date (PEBD) in the OCS History. The PEBD is the date the candidate reports to OCS for the first

AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING PROCESS

time (e.g. the OCS report date). The PEBD is different for prior service applicants; the OST will enter the prior service applicant's original PEBD in the PEBD block. In addition to entering the applicant's PEBD, the OST must schedule the applicant for the appropriate OCS class (e.g. OCC 223, PLC 17 Combined, PLC Juniors 1st Increment, etc.).

4. The OST must save all of this information in MCRISS-OS for the contract to be accurately counted in the working sections of MCRISS.

**AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRIS CONTRACTING
PROCESS**

Applicant Name:	SSN:
Program:	OST:

The following are documents required for ALL applicants:

Medical

Comp N/A

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | DD 2351 or DD 2808 (Report of Medical Exam) |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 2492 or DD 2807-1 (Report of Medical History) |
| <input type="checkbox"/> | <input type="checkbox"/> | DoDMERB Physical Exam Qualification (if applicant went through DoDMERB) |
| <input type="checkbox"/> | <input type="checkbox"/> | HIV Results (if when applicant went through DoDERMB) |
| <input type="checkbox"/> | <input type="checkbox"/> | Dental Qualification (DD 2813, Dental SOU, or SMCR dental exam) |
| <input type="checkbox"/> | <input type="checkbox"/> | Pap Smear (females over 21) |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMED 6120/3 - Annual Certification (if necessary to keep physical current) |
| <input type="checkbox"/> | <input type="checkbox"/> | MCRC Medical Checklist (signed off by District Corpsman) |
| <input type="checkbox"/> | <input type="checkbox"/> | PFT Sheet |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 2005 - Health Record Privacy Act Statement |
| <input type="checkbox"/> | <input type="checkbox"/> | Level of Activity Statement |
| <input type="checkbox"/> | <input type="checkbox"/> | SOU Dental Requirements Prior to Attending OCS |
| <input type="checkbox"/> | <input type="checkbox"/> | Additional Medical Documents as Required (e.g. eye surgery documents, allergy questionnaire, etc.) |

Orders

- | | | |
|--------------------------|--------------------------|----------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 10468 - Request for Orders |
|--------------------------|--------------------------|----------------------------------|

Financial - N/A

Contracts

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Certified copy of Social Security Card |
| <input type="checkbox"/> | <input type="checkbox"/> | Certified copy of Birth Verification |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 11000 - Privacy Act Statement |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 4 - Enlistment/Reenlistment Document |
| <input type="checkbox"/> | <input type="checkbox"/> | Annex A - SOU MC Sexual Assault/Harassment Policy |
| <input type="checkbox"/> | <input type="checkbox"/> | Annex B - Service Agreement |
| <input type="checkbox"/> | <input type="checkbox"/> | Annex C - Statement of Conditional Enlistment |
| <input type="checkbox"/> | <input type="checkbox"/> | Annex D - SOU for Accession to Active Duty |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 10418-2 - Certificate of Understanding Reasons for Disenrollment |
| <input type="checkbox"/> | <input type="checkbox"/> | SOU MC Fraternization Policy |
| <input type="checkbox"/> | <input type="checkbox"/> | SOU MC Drug Policy |
| <input type="checkbox"/> | <input type="checkbox"/> | Restrictions on Personal Conduct |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 11494 - Service Member's Civil Relief Act |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 2058 - State of Legal Residence |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 93 - Record of Emergency Data |

Academic

Comp N/A

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 10469 - Academic Certification Form |
|--------------------------|--------------------------|---|

**AUTOMATED COMMISSIONING PACKAGE (ACP) PROGRAM / ACP CHECKLIST / MCRISS CONTRACTING
PROCESS**

Comp N/A

- | | | |
|--------------------------|--------------------------|------------------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | Transcripts |
| <input type="checkbox"/> | <input type="checkbox"/> | Mental Qualifier (ACT, SAT, ASVAB) |
| <input type="checkbox"/> | <input type="checkbox"/> | Proof of Degree (OCC only) |

Application

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | Photo Page |
| <input type="checkbox"/> | <input type="checkbox"/> | 100-Word Essay (scanned w/District/Region requirements for selection board) |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 10418/-1 - Application for Officer Programs |
| <input type="checkbox"/> | <input type="checkbox"/> | Drug Statement |
| <input type="checkbox"/> | <input type="checkbox"/> | Minor Traffic Page |
| <input type="checkbox"/> | <input type="checkbox"/> | Non-Traffic Arrest Form |
| <input type="checkbox"/> | <input type="checkbox"/> | SOU Marine Officer Tattoo Policy |
| <input type="checkbox"/> | <input type="checkbox"/> | Tattoo Screening Form |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 369 - Police Record Check |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 124 - OSO Evaluation |
| <input type="checkbox"/> | <input type="checkbox"/> | NAVMC 10064 - Personal Information Questionnaire's (x5) |
| <input type="checkbox"/> | <input type="checkbox"/> | Waiver Packages (as applicable) |

The following are ADDITIONAL program-specific requirements:

SNA/SNFO

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | ASTB-E Qualifying Score |
| <input type="checkbox"/> | <input type="checkbox"/> | NAMI Physical Exam Qualification (OCC only) |

Law

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | LSAT Score |
| <input type="checkbox"/> | <input type="checkbox"/> | Proof of Admittance to Practice Law (OCC only) |
| <input type="checkbox"/> | <input type="checkbox"/> | Acceptance Letter to Law School (college seniors applying for PLC Law only) |

Prior Service/Reservist

- | | | |
|--------------------------|--------------------------|---|
| <input type="checkbox"/> | <input type="checkbox"/> | DD 214 - Discharge Papers and Separation Documents (prior service only) |
| <input type="checkbox"/> | <input type="checkbox"/> | DD 368 - Request for Conditional Release (if on contract w/sister service only) |

Married/Dependent

- | | | |
|--------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Spouse/Dependent SSN cards and birth verifications |
| <input type="checkbox"/> | <input type="checkbox"/> | Marriage License |
| <input type="checkbox"/> | <input type="checkbox"/> | Officer Financial Worksheet (married only) |
| <input type="checkbox"/> | <input type="checkbox"/> | Applicant Statement on FMF Service (married only) |
| <input type="checkbox"/> | <input type="checkbox"/> | Single Parent Statement (if applicable) |
| <input type="checkbox"/> | <input type="checkbox"/> | Divorce Decree (if applicable) |
| <input type="checkbox"/> | <input type="checkbox"/> | Custody Agreement (if applicable) |

OSO Signature / Date

OST BATTLE RHYTHM

The business practices for each Region and District will guide the OST's battle rhythm. The information below is meant to serve as a general guide for new OSOs.

July	August	September
<ul style="list-style-type: none"> - PLC 2nd Increment Shipping - OCC board - Input OCC board notes NLT end of 1st week - Finalize Annual Plan - Schedule table displays for the first semester - Begin planning for Survivor's Picnic - Register/Attend Freshman Orientations - Begin contracting for PLC - Summer OCC Board 100% Phase Line 	<ul style="list-style-type: none"> - Finalize 1st semester visit schedule - Register for Career Fairs - Conduct Survivor's Picnic - Begin FAP/TAP applications for OCS complete candidates - Attend Freshman Orientations - Poster - Request school lists - Send out mass emails - Prospect - busiest time of the year on campus - Schedule NAMI for May PLC grads - Submit RFAs for December PLC grads - OCC Fall Board 33% Phase Line 	<ul style="list-style-type: none"> - Prospect - busiest time of the year on campus - Drive processing/contracting - Collect transcripts and ACFs - Follow up on school lists - OCC shipping - Send MEPS physicals to BUMED for May PLC grads - PLC 25% Phase Line - OCC Fall Board 66% Phase Line

October	November	December
<ul style="list-style-type: none"> - Drive processing/ contracting - Continue prospecting - (campus activity begins to slow down) - QC all packages for Nov OCC and PLC boards - Input OCC board notes - Finalize FAP/TAP applications - Begin RFAs for May PLC grads - Schedule returning PLC Srs for training (50/50 split; females - 2nd Incr) - Submit in RFOs & annotate in MCRISS 	<ul style="list-style-type: none"> - Drive processing/ contracting - OCC board and PLC board - Input PLC board notes - Begin planning for 2nd semester - Register for Career Fairs & schedule school visits - Begin working RFAs for May grads - OCC Fall Board 100% Phase Line 	<ul style="list-style-type: none"> - Drive processing/ contracting - Complete planning for 2nd semester - Begin work on shipping requirements for PLC selectees - Submit RFAs for May PLC grads - National OSO Training Event (Dec/Jan) - PLC 50% Phase Line

OST BATTLE RHYTHM

January	February	March
<ul style="list-style-type: none"> - OCC shipping - Conduct pool audit - National OSO Training Event? - Collect transcripts and ACFs - Submit FAP & MCTAP 2nd semester applications - Prospect (beginning of 2nd semester) - OCC Winter Board 33% Phase Line 	<ul style="list-style-type: none"> - Prospect - focus shifts to OCC and PLC for the next FY - Drive processing and contracting - Begin planning for Pre-OCS weekend in April - QC all packages for Mar OCC selection board & begin QC'ing PLC packages for Apr - OCC Winter Board 66% Phase Line 	<ul style="list-style-type: none"> - OCC board - Input OCC board notes - Input PLC board notes - Begin identifying individuals for Educator's/Key Leader's Workshop - Pre-OCS training planning/coordination - PLC 75% Phase Line - OCC Winter Board 100% Phase Line

April	May	June
<ul style="list-style-type: none"> - Focus shifts to shipping - PLC board - Conduct Pre-OCS Weekend - Register for Freshman Orientations - Begin working on shipping requirements - Medical requirements/records - Shipping arrangements/transportation report - Pre-OCS Checklist for 1st Incr, OCC, PLC Comb - Schedule NAMI for PLC Dec grads - Submit MEPS physicals to BUMED for Dec PLC grads - NROTC non-select list - Prospect for OCC - Drive processing and contracting - Identify individuals for Educator's/Key Leader's Workshop - PLC 100% Phase Line 	<ul style="list-style-type: none"> - PLC 1st Incr shipping - Begin working on Annual Plan - Register/attend New Student Orientations - Collect transcripts/degree verification - Commissioning ceremonies - OCS Prep continues - Finalize attendees for Educator's/Key Leader's Workshop - Summer OCC Board 33% Phase Line 	<ul style="list-style-type: none"> - OCC/PLC Combined shipping - Begin RFAs for December PLC grads - Develop Annual Plan - Educator's/Key Leader's Workshop - Pre-OCS Checklists for 2nd Increment - Register/attend New Student Orientations - Summer OCC Board 66% Phase Line

MONTHLY ACTIVITY REPORT

	CONT	APPT	INTVW	NWA	CONTR
TC					
DC					
AC					
OT					
TOT					

OSS: _____

FOR THE MONTH OF: _____

		PLC				PLC				PLC				OCC					OCC					OCC					TOT
		G	A	NFO	L	G	A	NFO	L	G	A	NFO	L	G	A	NFO	R	L	G	A	NFO	R	L	G	A	NFO	R	L	
INTVW	ALL																												
	AA/H/O/F																												
NWA	ALL																												
	AA/H/O/F																												
CONTR	ALL																												
	AA/H/O/F																												
MSN	ALL																												
	AA/H/O/F																												
SUBMIT FYTD	ALL																												
	AA/H/O/F																												

EFFECTIVENESS RATIOS

CR (INTVW/NWA) :

PR (NWA/CONTR) :

SR (INTVW/CONTR) :

DATA ANALYSIS WORKSHEET

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Tot	
A. DETERMINE YOUR STANDARD OF EFFECTIVENESS FOR TELEPHONE CANVASSING (TC)														
1. Total # of TC contacts for the month	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Total # of interviews you held as result of TC	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide the contacts by the interviews held	_____		_____		_____		_____		_____		_____		_____	
B. DETERMINE YOUR STANDARD OF EFFECTIVENESS FOR DIGITAL COMM (DC)														
1. Total # of people that responded to an DC	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Total # of interviews you held as result of DC	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide the responses by the interviews held	_____		_____		_____		_____		_____		_____		_____	
C. DETERMINE YOUR STANDARD OF EFFECTIVENESS FOR AREA CANVASSING (AC)														
1. Total # of AC contact you made	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Total # of interviews you held as result of AC	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide the contacts by the interviews held	_____		_____		_____		_____		_____		_____		_____	
D. DETERMINE YOUR STANDARD OF EFFECTIVENESS FOR OFFICE TRAFFIC (OT)														
1. Total # of contacts resulting from OT	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Total # of interviews you held as result of OT	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide the contacts by the interviews held	_____		_____		_____		_____		_____		_____		_____	
E. DETERMINE YOUR CLOSING RATIO (CR)														
1. Add all interviews (TC+DC+AC+OT)	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Add total number of New Working Applicants	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide total interviews by NWAs	_____		_____		_____		_____		_____		_____		_____	
F. DETERMINE YOUR PROCESSING RATIO (PR)														
1. Add total NWA for each month	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Add total # of contracts written each month	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide total NWAs by total contracts written	_____		_____		_____		_____		_____		_____		_____	
G. DETERMINE YOUR SALES RATIO (SR)														
1. Add all interviews (TC+DC+AC+OT)	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
2. Add total # of contracts written each month	_____	+	_____	+	_____	+	_____	+	_____	+	_____	+	_____	= _____
3. Divide total interviews by total contracts	_____		_____		_____		_____		_____		_____		_____	

OBJECTIVES SHEET

OSO/OSS

Date Prepared

1. ANALYSIS FOR THE MONTH OF

A. Standards of Effectiveness (SOE)

1. Telephone Canvassing

2. Digital Communication

3. Area Canvassing

4. Office Traffic

B. Business Percentage (BP)

1. Telephone Canvassing

2. Digital Communication

3. Area Canvassing

4. Office Traffic

C. Closing Ratio (CR)

D. Processing Ratio (PR)

E. Sales Ratio (SR)

2. OBJECTIVES FOR THE MONTH OF:

A. Interview Objectives (IO)

$$\frac{\text{SR}}{\text{MONTHLY CONTR OBJ}} = \frac{\text{MO}}{\text{WEEK}}$$

B. New Working Applicant Objective (AO)

$$\frac{\text{IO}}{\text{CR}} = \frac{\text{MO}}{\text{WEEK}}$$

C. Activity Objectives

$$\text{TC: } \frac{\text{IO/MO}}{\text{SOE}} \times \frac{\text{BP}}{\text{MONTHLY CONTR OBJ}} = \frac{\text{MO}}{\text{WEEK}}$$

$$\text{DC: } \frac{\text{IO/MO}}{\text{SOE}} \times \frac{\text{BP}}{\text{MONTHLY CONTR OBJ}} = \frac{\text{MO}}{\text{WEEK}}$$

$$\text{AC: } \frac{\text{IO/MO}}{\text{SOE}} \times \frac{\text{BP}}{\text{MONTHLY CONTR OBJ}} = \frac{\text{MO}}{\text{WEEK}}$$

$$\text{OT: } \frac{\text{IO/MO}}{\text{SOE}} \times \frac{\text{BP}}{\text{MONTHLY CONTR OBJ}} = \frac{\text{MO}}{\text{WEEK}}$$

D. Monthly Contracting Objective:

PROSPECTING PLANNING MATRIX

OST:

MONTH:

YEAR:

Sales Ratio:

Processing Ratio:

Area Canvass SOE:

Prospecting Days Remaining for PLC: _____

Prospecting Days Remaining for OCC (): _____

Prospecting Days Remaining for OCC (): _____

Prospecting Days Remaining for OCC (): _____

PLC				
PLC Comb	Mission	NWAs	Interviews	Contacts
Ground				
SNA				
SNFO				
Law				
AA				
Hisp				
Other				
Fem				

OCC				
OCC ()	Mission	NWAs	Interviews	Contacts
Ground				
SNA				
SNFO				
Law				
Reserve				
AA				
Hispanic				
Other				
Female				

PLC ()	Mission	NWAs	Interviews	Contacts
Ground				
SNA				
SNFO				
Law				
AA				
Hispanic				
Other				
Female				

OCC ()	Mission	NWAs	Interviews	Contacts
Ground				
SNA				
SNFO				
Law				
Reserve				
AA				
Hispanic				
Other				

PLC ()	Mission	NWAs	Interviews	Contacts
Ground				
SNA				
SNFO				
Law				
AA				
Hispanic				
Other				
Female				

OCC ()	Mission	NWAs	Interviews	Contacts
Ground				
SNA				
SNFO				
Law				
Reserve				
AA				
Hispanic				
Other				
Female				

Total Contacts: _____
 Required Contacts per Day: _____
 Total Diversity Contacts per Day: _____
 (Total Contacts) / (PLC Days Remaining): _____

NWA = (Mission) x (Processing Ratio)
 Round up PR before calculating

Interviews = (Mission) x (Sales Ratio)
 Round up the answer

Contacts = (Interview) x (Area Canvassing SOE)
 Round up the answer

Total Contacts (): _____
 Required Contacts per Day: _____
 Total Diversity Contacts per Day: _____
 (Total Contacts) / OCC () Days Remaining: _____

Total Contacts (): _____
 Required Contacts per Day: _____
 Total Diversity Contacts per Day: _____
 (Total Contacts) / OCC () Days Remaining: _____

Total Contacts (): _____
 Required Contacts per Day: _____
 Total Diversity Contacts per Day: _____
 (Total Contacts) / OCC () Days Remaining: _____

CANDIDATE RECORD

[illegible]