



UNITED STATES MARINE CORPS
MARINE FORCES RESERVE
2000 OPELOUSAS AVE
NEW ORLEANS, LA 70146-5400

IN REPLY REFER TO:
1040
G-1
14 Mar 2012

FORCE POLICY LETTER 14-11

From: Commander, Marine Forces Reserve
To: Distribution List

Subj: CAREER PLANNING IMPROVEMENT INITIATIVE

Ref: (a) MCO 1040.31
(b) MCO 1040R.35
(c) MCO 7220.12P
(d) ForO 5400.3

Encl: (1) Sample PMOS 4821 Career Planner Appointment Letter
(2) Sample Collateral Duty Career Planner Appointment Letter

1. Purpose. To promulgate guidance for and implement changes to unit and force-level Career Planner procedures meant to mitigate the challenges of a geographically dispersed force and establish a strong leadership focus on this critical component of our reserve retention initiatives.

2. Background

a. Real and perceived challenges exist in the execution and delivery of career planning within the Reserve Component (RC), which may limit the Commander's ability to positively affect reserve retention.

b. Changes to the organizational structure of Career Planners may be necessary to overcome the challenges of a geographically dispersed force. However, until the conclusion of Force Structure Review Group (FSRG), such actions would be premature and only partially considerate of the geographic locations and distribution of Marines supported because those locations may change. Therefore, the potential redistribution of Career Planners is held in abeyance until a complete and final depiction of the manpower structure of Marine Forces Reserve (MARFORRES) is available.

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c. In this period of deferred analysis and action, we have an opportunity to focus on the fundamentals of the Career Planning Program within each unit. Improvements to basic procedures and increased adherence to already established orders and directives will mitigate the challenges of our geographic dispersion.

3. Action

a. In accordance with the references, all units will designate a Marine as the Career Planner who is either (1) an Active Reserve (AR) or Active Component (AC) Permanent Personnel Marine assigned the Primary Military Occupational Specialty (PMOS) of 4821 and assigned to a Career Planner billet on the Table of Organization (T/O) by HQMC, or (2) a Marine assigned the Career Planner collateral duty by the unit Commanding Officer.

(1) Permanent Personnel PMOS 4821 Career Planner

(a) AR or AC PMOS 4821 Career Planners will conduct daily operations in accordance with the provisions and responsibilities found in references (a) and (b).

(b) Units that rate and have an assigned AR or AC PMOS 4821 Career Planner will ensure the Marine is assigned to the correct Billet Identification Code (BIC) in MCTFS in order to receive Special Duty Assignment Pay (SDAP). The unit will certify annually per reference (c) that the Marine is qualified to serve as the Career Planner and remains eligible for SDAP.

(c) Unit Commanders will ensure a copy of Permanent Change of Station (PCS) orders for those AR or AC Marines assigned as Career Planners at their unit is forwarded to the respective Major Subordinate Commands (MSC) Career Planner.

(d) Unit Commanders will ensure a copy of assignment letters for those Marines assigned as PMOS 4821 Career Planners at their unit is forwarded to the respective MSC Career Planner. Enclosure (1) details the format for the Career Planner assignment letter.

(2) Collateral Duty Career Planner

(a) Commanders may assign Marines in the grade of Sergeant through Master Sergeant as Collateral Duty Career Planners.

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(b) Collateral Duty Career Planners will attend the non-MOS producing Collateral Duty Career Planner Course in San Diego, California. Collateral Duty Career Planners do not rate SDAP per reference (c). An annual message is released by the Commander, MARFORRES soliciting nominations to attend the course.

(c) Collateral Duty Career Planners should have a minimum of 24 months remaining on their contract upon the completion of the Collateral Duty Career Planner Course.

(d) Unit Commanders will ensure a copy of assignment letters for those Marines assigned as Collateral Duty Career Planners at their unit is forwarded to the respective MSC Career Planner. Enclosure (2) details the format for Collateral Duty Career Planner assignment letters. The Screening/Interview checklist utilized for AR and AC Marines assigned an MOS of 4821 will also be utilized for those who are assigned as the Collateral Duty Career Planner.

b. In accordance with references (a) and (b), unit Career Planners will not be assigned an excessive amount of collateral duties. Certain collateral duties, such as the Substance Abuse Control Officer (SACO) or the Equal Opportunity Advisor (EOA), must be avoided entirely. Ensure that the Career Planner has adequate time to conduct this important function within the command. They must have enough time to maneuver around both the unit commander's and the Marines' availability. Successful retention efforts can be inhibited by consistently engaging the unit Career Planner in duties competing for his/her time. Those Marines assigned as a Collateral Duty Career Planner will have primary duties other than career planning. This is unavoidable; however, they will be working with a smaller population than the battalion/squadron Career Planner, and will have the support of the T/O assigned Career Planner.

c. Unit Leaders **must** conduct their required interviews. There is no excuse for failing to conduct interviews with our Marines. Valuable information can be gained regarding the morale of the command during the conduct of these interviews, and retention of qualified Marines demands your attention and involvement. The system of record to document the results of the interview is the Total Force Retention System (TFRS). System access and training for TFRS is available from your MSC Career Planner via the unit Career Planner chain of command.

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d. All interviews will be documented in TFRS to ensure their completion and timeliness. MSC Career Planners will utilize TFRS to monitor subordinate unit actions for completion and timeliness. On order, MSC Career Planners will provide the status of interviews for their respective MSC to the MARFORRES Career Planner for briefing to the COMMARFORRES.

e. Unit Leaders will pay particular attention to those AC and AR Marines in the unit who will separate at the end of their contract or tour. All efforts will be made to ensure that these Marines are aware of the opportunities that exist as a member of the Selected Marine Corps Reserve (SMCR).

f. In geographic locations with co-located units sharing a Career Planner, full cooperation and support is expected from both the supporting and supported unit per reference (d). When conflict resolution exceeds the abilities of the unit commanders, the next higher headquarters (through the Career Planner chain of command) will provide resolution or forward until the issue is resolved. Higher headquarters will determine the timing and level of support, or provide Career Planner augmentation if an adequate solution is unattainable.

g. Commanders will have an open source of information regarding career retention on the MARFORRES "Stay Marine" website available on the MARFORRES homepage at the hyper-link [http://www.marines.mil/unit/marforres/Stay/default.aspx#MFR Banner](http://www.marines.mil/unit/marforres/Stay/default.aspx#MFR_Banner). For immediate support, specific questions may also be submitted via the MARFORRES Customer Service Center, toll free 1-800-255-5082.



R. E. BRAITHWAITE
Executive Director

DISTRIBUTION D:

Directives issued by this Headquarters are published and distributed electronically. Electronic versions of the Force Directives can be found at:

<http://www.marines.mil/unit/marforres/MARFORRESHQ/G1/Adjutant/G-1%20Adjutant%20Directives/index.aspx>



SAMPLE PMOS 4821 CAREER PLANNER
APPOINTMENT LETTER

UNITED STATES MARINE CORPS
(UNIT LETTER HEAD)

N REPLY REFER TO:

1040

CP

DD MM YY

From: Commanding Officer

To: Sergeant Help A. Marine XXX-XX-1234/4821 USMC

Subj: APPOINTMENT AS CAREER PLANNER AND AUTHORITY TO RECEIVE
SPECIAL DUTY ASSIGNMENT (SDA) PAY

Ref: (a) DoDFMR Vol 7a Para 080101c

(b) MCO P7220.12M

1. Per the references, you are hereby appointed as the Career Planner for the (spell out unit). The following data is certified to be current:

- a. Unit T/O # -
- b. BIC# - (Career Planner BIC # per unit T/O)
- c. Billet - Spell out Career Planner Level Billet (Div, Battalion, etc)
- d. Effective date - (Date Joined unit in MCTFS as Career Planner)
- e. Qualified - Yes (Must be AC/AR PMOS 4821 school Trained)

2. This appointment will be certified on an annual basis per reference (b) to continue receiving Special Duty Assignment (SDA) pay. Be advised that if you are relieved, transferred or change billets that your SDA pay will terminate effective the date the action occurs.

3. While serving in your capacity as the **UNIT NAME** Career Planner, you will ensure that all required interviews are documented in the Total Force Retention System (TFRS). System

Enclosure (1)

Subj: APPOINTMENT AS CAREER PLANNER AND AUTHORITY TO RECEIVE
SPECIAL DUTY ASSIGNMENT (SDA) PAY

access and training for TFRS is available from your MSC Career
Planner via the unit Career Planner chain of command.

I. N. CHARGE

Copy to:
HIGHER HEADQUARTERS



SAMPLE COLLATERAL DUTY CAREER PLANNER
APPOINTMENT LETTER

UNITED STATES MARINE CORPS
(UNIT LETTER HEAD)

N REPLY REFER TO:

1040

CP

DD MM YY

From: Commanding Officer
To: Master Sergeant Help N. Marines 000 00 1234/8999 USMC
Subj: APPOINTMENT AS COLLATERAL DUTY CAREER PLANNER
Ref: (a) MCO 1040.31
(b) MCO 1040R.35

Encl: (1) Commanding Officer's and Career Planner SNCOIC
Screening/Interview checklist

1. Per the references, you are hereby appointed as the Collateral Duty Career Planner for **SPELL OUT UNIT**. This appointment is made after careful screening and consideration. Your record and reputation as a responsible Marine, who displays a positive attitude towards yourself, our unit, and our Marine Corps will play an important role in this unit's retention efforts.

2. The following instructions are provided to assist you in the performance of your duties to help the Marine of this command with their careers.

a. Review the references and attend the collateral duty Career Planner Course within 12 months of the effective date of this assignment.

b. Contact all the Marines of this unit about their Marine Corps options.

c. Per the Marine Corps Orders, confirm that all required interviews are conducted.

d. Ensure that all required interviews are documented in the Total Force Retention System (TFRS). System access and training for TFRS is available from your MSC Career Planner via the unit Career Planner chain of command.

Enclosure (2)

Subj: APPOINTMENT AS COLLATERAL DUTY CAREER PLANNER

e. Ensure that Marines who desire further service, their requests are submitted in a timely manner per the references.

f. A retention tool that you and the Marines in your command may utilize is the MARFORRES "Stay Marine" website [http://www.marines.mil/unit/marforres/stay/default.aspx#MFRbanne
r.](http://www.marines.mil/unit/marforres/stay/default.aspx#MFRbanne_r)

3. (**UNIT T/O CAREER PLANNER'S NAME**) will assist you with any questions you may have as well as the submission of requests for further service and results of conducted interviews into the electronic database system. **She/He** can be reached at DSN, commercial phone number, and email address.

4. These instructions serve as a minimum guidance directing you as you assist us with the retention efforts of this command. Should special circumstances arise, or should you discover new ways to help our Marines, please bring them to my attention as well as the T/O career planner.

5. You have been assigned to help the retention efforts of the Marine Corps team. This is an important assignment, as your attitude and conduct will most certainly set the example for each Marine you contact. I have every confidence that you will respond accordingly.

I. N. CHARGE

Copy to:
HIGHER HEADQUARTERS

Appendix B

Commanding Officer's and Career Planner SNCOIC Screening/
Interview Checklist for Lateral Move to MOS 4821 (Career Planner)

FOUO - Privacy sensitive when filled in.

THIS CHECKLIST WILL BE DESTROYED UPON COMPLETION OF CAREER PLANNER SCHOOL OR AS LISTED IN DESTRUCTION INSTRUCTIONS. A COPY OF THIS CHECKLIST WILL BE SENT TO CMC (MMEA-6) PRIOR TO THE MARINE DETACHING, STIPULATING SUCCESSFUL OR UNSUCCESSFUL SCREENING BY THE COMMANDING OFFICER AND CAREER PLANNER SNCOIC.

Background. The Career Planner is vital to the process of retaining Marines. The Career Planner assists the commander in maintaining a stable career force. Marines will emulate the Career Planner's actions. Therefore, a potential Career Planner must possess a high degree of maturity, leadership, judgment, professionalism, and the ability to work in an independent capacity. Furthermore, potential Career Planners must thoroughly embrace and exemplify our core values.

The Career Planner School will provide prospective Career Planners with the required entry-level knowledge for career planning duties and responsibilities. The school will teach Marines effective communication skills and the fundamentals and methods of career planning. The potential Career Planner must be able to project a positive disposition and exemplify those traits associated with utmost professionalism. Career Planners will represent the type of Marine we desire to retain in the career force.

Action. One copy of the completed Commanding Officer's and Career Planner SNCOIC Screening/Interview Guide and Medical Screening Guide will be placed on the left side of the Marine's Service Record Book prior to the Marine's transfer to Career Planning School. Thirty days prior to transfer, the Commanding Officer will re-certify that the Marine is still qualified for career planning duty.

One copy of the completed Commanding Officer's and Career Planner SNCOIC Screening/Interview Guide, and current photograph, along with certified copies of the Marine's page 11, 12 and 13 will be forwarded to CMC (MMEA-8). The Marine's command will contact CMC (MMEA-8) via naval message when there is a change in the Marine's status.

Upon request, certain criteria may be waived by CMC (MMEA).

RANK	NAME	L4 SSN/MOS
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FOR OFFICIAL USE ONLY

RANK

NAME

L4 SSN/MOS

<u>PREREQUISITE</u>	<u>INITIAL SCREENING</u>	<u>RECERTIFICATION</u>
1. Career Marine. Must have successfully completed one or more enlistments/reenlists or reenlist as part of the FTAP.	QUAL / NOT QUAL	QUAL / NOT QUAL
2. Career Potential. Must meet or exceed all standards required for retention (MCO 1040.31K, Chap 4). Have completed the appropriate PME (resident and non-resident) for grade.	QUAL / NOT QUAL	QUAL / NOT QUAL
3. Grade. Sergeant through Staff Sergeant. (Corporals may submit if they have at least one year time in grade.)	QUAL / NOT QUAL	QUAL / NOT QUAL
4. Integrity/Judgment. Marines must demonstrate sound integrity and judgment due to the fact that these Marines often work in an independent duty capacity.	QUAL / NOT QUAL	QUAL / NOT QUAL
5. Core Values. Marine thoroughly embraces and exemplifies our core values and leads by example in this area.	QUAL / NOT QUAL	QUAL / NOT QUAL
6. High School Grad/GED. Career Planners should have an educational background equal to that of the majority of Marines who they will be assisting. Marines with a reading level below the 10th grade may experience some difficulty assimilating Career Planner School course material. The Marine must be a high school graduate.	QUAL / NOT QUAL	QUAL / NOT QUAL
7. GT score must be 100 or above. GT score: _____	QUAL / NOT QUAL	QUAL / NOT QUAL
8. DISCIPLINARY RECORD AND DRUG OR ALCOHOL RELATED INCIDENT(S) .		
a. <u>Courts-Martial</u> - - No courts-martial.	QUAL / NOT QUAL	QUAL / NOT QUAL
b. <u>NJP</u> - - Not more than one NJP in the last 5 years preceding the class reporting date. No NJP in the last 24 months preceding the date of request.	QUAL / NOT QUAL	QUAL / NOT QUAL
c. <u>Pg 11</u> - - No adverse page 11 entries (i.e., MARCORSEPMAN para 6105 counseling) in the last 24 months preceding the reporting date.	QUAL / NOT QUAL	QUAL / NOT QUAL

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RANK

NAME

L4 SSN/MOS

<u>PREREQUISITE</u>	<u>INITIAL SCREENING</u>	<u>RECERTIFICATION</u>
d. <u>Drug and Alcohol</u> - - No drug-related incidents. No alcohol related incidents within the last 3 years preceding the class reporting date. A waiver granted for reenlistment is not valid for assignment to Career Planning duty. A separate waiver must be requested from CMC (MMEA-8).	QUAL / NOT QUAL	QUAL / NOT QUAL
9. Stable Family.		
a. The Marine is not currently enrolled in a command-directed Family Advocacy Program as verified by the local Family Services Center.	QUAL / NOT QUAL	QUAL / NOT QUAL
b. Divorce/Separation. Divorce or Separation standing alone does not disqualify someone for assignment to Career Planner Duty. However, a Marine is not qualified when his/her bonafide separation/divorce/custody proceedings may interfere with training requirements and assigned duties. "The Marine is/is not currently separated or undergoing divorce proceedings."	QUAL / NOT QUAL	QUAL / NOT QUAL
10. Physically qualified. The Marine experiences no difficulty in passing all events of the PFT/CFT. Upon recertification, Marines must pass a PFT within 30 days of detaching for school. PFT Score/Class/Date: ____/____/____	QUAL / NOT QUAL	QUAL / NOT QUAL
11. Meets minimum obligated service. Marines must have a minimum of 2 years of active service remaining upon completion of school. EAS: _____	QUAL / NOT QUAL	QUAL / NOT QUAL
12. Communications. The ability to communicate is essential to career planning. Marines should be able to converse in a clear manner. A Career Planner should be persuasive and personable, comfortable among Officers, SNCOs, and peers.	QUAL / NOT QUAL	QUAL / NOT QUAL

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RANK _____ NAME _____ L4 SSN/MOS _____

<u>PREREQUISITE</u>	<u>INITIAL SCREENING</u>	<u>RECERTIFICATION</u>
<p>13. Meets personal appearance and height and weight standards. The Marine must be within the Marine Corps height and weight standards IAW reference (s). No history of assignment to weight control or personal appearance programs is authorized. The Marine must be weighed/measured in P.T. gear, no shoes.</p>		
<p>HT: _____ WT: _____ NECK: _____ WAIST: _____ Hips: _____ (FEMALES ONLY) BODY FAT: _____ (indicate body fat if Marine is over weight) DATE: _____</p>	<p>HT: _____ WT: _____ NECK: _____ WAIST: _____ Hips: _____ (FEMALES ONLY) BODY FAT: _____ (indicate body fat if Marine is over weight) DATE: _____</p>	<p>QUAL / NOT QUAL</p> <p>QUAL / NOT QUAL</p>
<p>14. Medically qualified for duty: A physical examination by a medical officer must be conducted within 12 months of the class reporting date and state "qualified for Career Planning duty" in block 77 of DD Form 2808. <u>The Commanding Officer and Medical Officer will also screen the Marine and the Marine's medical records per the Commanding Officer's Medical Screening Guide (See page 5 of Appendix B).</u></p>		
<p>15. Disqualifying factors</p>		
<p>In less than full duty status.</p>	<p>QUAL / NOT QUAL</p>	<p>QUAL / NOT QUAL</p>
<p>Failed selection to next grade.</p>	<p>QUAL / NOT QUAL</p>	<p>QUAL / NOT QUAL</p>
<p>Disenroll/Failure to complete Special Assignment School/Duty. To include recruiter school communication skills drop.</p>	<p>QUAL / NOT QUAL</p>	<p>QUAL / NOT QUAL</p>
<p>Failure to complete formal school (e.g. Sergeants Course, SNCO Career Course, SNCO Advanced Course, and Career Planning (Career Planner Course).</p>	<p>QUAL / NOT QUAL</p>	<p>QUAL / NOT QUAL</p>
<p>Currently serving on a B-billet or with 24 months of assignment to the Career Planner Force.</p>	<p>QUAL / NOT QUAL</p>	<p>QUAL / NOT QUAL</p>
<p>Relieved from a Special Duty Assignment due to misconduct.</p>	<p>QUAL / NOT QUAL</p>	<p>QUAL / NOT QUAL</p>

RANK	NAME	L4 SSN/MOS
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This Marine does/does not meet the requirements listed in MCO 1040.31K. If the Marine does not meet the requirements, explain below.

(Ensure the following signature page is attached.)

Battalion/Squadron SgtMaj's Printed Name	Date
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Battalion/Squadron SgtMaj's Signature	Date
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Commanding Officer's Printed Name	Rank
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Commanding Officer's Signature	Date
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Commanding Officer's Re-certification: (To be completed 30 days prior to the Marine's school report date.) This Marine's qualifications for assignment to Career Planning duty have/have not changed since my initial interview and screening of his/her records. The Marine does/does not meet the requirements listed in MCO 1040.31K. (If the Marine no longer meets the requirements, contact CMC (MMEA-8) via naval message.)

Commanding Officer's Signature	Date
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RANK	NAME	L4 SSN/MOS
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II. MEDICAL SCREENING GUIDE FOR CAREER PLANNING DUTY

Attention Commanding Officer's and Medical Representatives. DD forms 2807-1 and 2808 must be completed. A medical officer will certify block 77 of DD Form 2808 confirming that the Marine is physically qualified for duty as a Career Planner. Medical representatives must have a thorough appreciation of the physical demands of a Career Planner, specifically:

1. All Marines are expected to be physically/medically fit and able to pass the required school PFT.

2. Additionally, any medical documentation indicating problems with stress or psychological dysfunction may be disqualifying and must be identified in the remarks section below.

3. Marines found unqualified for these reasons may be directed to appear before a Physical Evaluation Board to determine their fitness for worldwide assignment.

I found him/her medically qualified/unqualified. The finding of UNQUALIFIED is explained in the remarks below.

Medical Officer's Printed Name	Grade	Billet
Medical Officer's Signature	Date	

Remarks by Medical Officer:

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