

**THE OFFICER EVALUATION REPORTING SYSTEM
"IN BRIEF"**

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The word "he" when used in this publication represents both masculine and feminine genders, unless otherwise specifically stated.

This pamphlet explains the Officer Evaluation Reporting System in brief. It provides instructions for rating officials and the rated officer to prepare Officer Evaluation Report forms. Refer to AR 623-105 for detailed information of the Officer Evaluation Reporting System.

OVERVIEW OF KEY ELEMENTS

The Officer Evaluation System (OES) is the Army's method of identifying those officers best qualified and those not qualified for advancement and assignment to positions of increased responsibility.

- The Officer Evaluation System includes evaluations of officer performance and potential in the duty environment using the Officer Evaluation Report, in schools using the Academic Evaluation Report, and at Department of the Army (DA), National Guard Bureau (NGB), and State headquarters using the selection board and personnel management systems.

- The Officer Evaluation Reporting System (OERS) is a subsystem of the Officer Evaluation System. It includes procedures for organizational evaluation chain assessment of an officer's performance and an estimation of potential for future service based on the manner of that performance.

- Potential is defined as the ability to perform at higher levels of responsibility and/or grade.

- The DA, NGB, and State headquarters evaluations of an officer's potential are judgments of an officer's ability to perform at a specified level of responsibility or autho-

rity based on the Army's requirements for officers in each grade, officer qualifications, and officer performance.

- In the duty environment, the evaluation of potential is a judgment of the officer's capability to advance based upon his performance within the organization.

- Performance includes the results or accomplishment of tasks, the manner in which tasks are approached, and the degree of adherence to officer corps' professional norms or values which apply to all officers regardless of duty position, grade, or specialty.

- The DA, NGB, and State headquarters evaluations of performance are based on a series of reports on performance over a variety of duty positions covering the officer's entire career.

- In the organizational duty environment, performance is compared with the duty position requirements for a specific rating period.

OFFICER EVALUATION SYSTEM

OFFICER EVALUATION REPORTING SYSTEM

POTENTIAL

DEPARTMENT OF ARMY, NGB AND STATE HQS
ORGANIZATIONAL DUTY ENVIRONMENT

PERFORMANCE

DEPARTMENT OF ARMY, NGB AND STATE HQS
ORGANIZATIONAL DUTY ENVIRONMENT

OVERVIEW OF KEY ELEMENTS

FUNCTIONS OF THE OFFICER EVALUATION REPORTING SYSTEM

The OERS is specifically designed to support three major functions.

- The major function of the OERS is to provide information from the organizational rating chain to DA, NGB, and State headquarters for officer personnel decisions.

- After considering the ARNG officer requirements, the information is used, along with the individual officer's background experience and expertise, to provide a basis for officer personnel actions such as promotion, elimination, retention in grade, command designation, school selection, assignment, specialty designation, and awarding specialties.

- Information on the report is also used by successive members of the rating chain in making their evaluation of the rated officer.

- The other two functions of the OERS are to encourage the professional development of the officer corps and to enhance mission accomplishment.

- These functions represent an expanded view of the importance and pervasiveness of the OERS. The system not only provides information to DA, NGB, and State

headquarters, but it emphasizes and effects senior/subordinate relationships, highlights performance criteria, and establishes the basic for the direction of performance in most organizations. Properly used, the OER provides the rating chain with a powerful leadership/management tool.

- The key to the accomplishment of these functions is effective communication. While this has always been a major aspect of leadership, continual reemphasis is necessary. It is through this communication that the rated officer is made aware of the specific nature of his duties and is provided an opportunity to participate in the organizational planning process. The rater uses the communication to give direction to and develop his subordinates, to obtain information as to the status and progress of his organization, and to systematically plan for the accomplishment of the mission.

- The senior/subordinate communication process also facilitates the dissemination of career development information, advice, and guidance to the rated officer. This enables the rated officer to take advantage of the superior's experience when making specialty or assignment related decisions.

OBTAIN INFORMATION FOR:
DA, NGB AND STATE HQS
SELECTION AND ASSIGNMENT DECISIONS
RATING CHAIN USE IN MAKING THEIR EVALUATIONS.

ENCOURAGE PROFESSIONAL DEVELOPMENT THROUGH:
PERFORMANCE COUNSELING/COACHING.
CAREER COUNSELING/COACHING.
EMPHASIS ON PROFESSIONAL VALUES.

ENHANCE MISSION ACCOMPLISHMENT BY:
INCREASED ADVANCED PLANNING.
RELATING PERFORMANCE TO MISSION.
FOCUSING ON INDIVIDUAL TALENT.

FUNCTIONS OF THE OFFICER EVALUATION SYSTEM

NEW FEATURES

The OERS incorporates several new features which have not been included in previous officer evaluation reporting systems.

Rated Officer Participation--Participation by the rated officer addresses all three functions of the evaluation system. It provides additional information to the rating chain from the rated officer's point of view, encourages a two-way communication and professional development, and increases the effectiveness of organizations by focusing performance more directly on the mission.

Senior Rater Concept--This concept includes two major changes. First, it increases the role of the most senior rating official from that of a purely administrative review, to include a critical evaluation of the rated officer's potential. Second, it allows for greater flexibility in the number of officials in the rating chain in order to deal more effectively with geographical spread and functional autonomy. To reflect the change in concept, the names of the rating officials have been changed to the rater, intermediate rater, and senior rater.

Rules for Establishing Rating Chains--Commanders are responsible for establishing rating chains for their organizations. (See table 1 requirements for rating officials.)

Senior Rater Profile--The system uses an adjunct to the senior rater's evaluation of the rated officer's potential. This is accom-

plished by maintaining a profile or tracking the rating history of the senior rater and making that information visible to boards and managers for use in comparing a specific rating against the senior rater's normal rating tendency.

Assists Organizational Effectiveness--The system's emphasis on increased communication, development of subordinates, objective setting, and problem solving provides a major assist to the Army's Organization Effectiveness Program.

Support the Army National Guard Officer Personnel Management System (OPMS-ARNG)--The OERS supports the specialty concept of OPMS-ARNG by insuring that an officer's specialties are considered along with the specialty requirements of his duty position when he is evaluated.

Increased Administrative Accuracy--This is accomplished by simplifying certain administrative techniques such as the accountability of rating periods and by having the rated officer verify the accuracy of both the administrative data and the rating chain membership.

Assists Boards and Managers--Information on the OER is arranged to facilitate its use by board members and managers.

NEW FEATURES

<p>RATED OFFICER PARTICIPATION</p> <p>SENIOR RATER CONCEPT</p> <p>SENIOR RATER PROFILE</p> <p>FACILITATES ORGANIZATIONAL EFFECTIVENESS</p> <p>SUPPORT OPMS - ARNG</p> <p>INCREASED ADMINISTRATIVE ACCURACY</p> <p>DESIGNED TO ASSIST BOARDS AND MANAGERS</p>
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RULES FOR ESTABLISHING RATING CHAINS		
<p>COMMANDERS ARE RESPONSIBLE FOR ESTABLISHING RATING CHAINS FOR THEIR ORGANIZATIONS.</p> <p>COMMANDERS WILL NORMALLY RATE COMMANDERS.</p>		
REQUIREMENTS FOR RATING OFFICIALS		
RATING OFFICIALS		
RATER	<p>WILL NORMALLY BE THE IMMEDIATE SUPERVISOR OF THE RATED OFFICER.</p> <p>WILL BE SENIOR TO THE RATED OFFICER.</p> <p>MAY ALSO SERVE AS SENIOR RATER IF HE IS A GENERAL OFFICER IN COMMAND.</p>	
INTERMEDIATE RATER	<p>WILL BE INCLUDED WHEN THERE IS AN INTERMEDIATE LEVEL OF SUPERVISION BETWEEN THE RATER AND SENIOR RATER.</p> <p>IF INCLUDED, WILL BE SENIOR TO THE RATED OFFICER AND OF EQUAL OR HIGHER GRADE THAN RATER.</p>	
SENIOR RATER	<p>WHEN THE GRADE OF THE RATED OFFICER IS:</p>	<p>THE MINIMUM GRADE OF THE SENIOR RATER IS:</p>
	WARRANT OFFICER	MAJOR
	2ND LIEUTENANT	GS-14
	1ST LIEUTENANT	
	CAPTAIN	LTC GS-14
	MAJOR	COL GS-15
	LIEUTENANT COLONEL	BG (PREFERRED) COL (ACCEPTABLE) GS-15
COLONEL	MG (PREFERRED) BG (ACCEPTABLE) GS-17	
BRIGADIER GENERAL	EQUAL TO OR HIGHER THAN GRADE OF RATER AND/OR INTERMEDIATE RATER.	
MAJOR GENERAL		

TABLE 1 REQUIREMENTS FOR RATING OFFICIALS

EVALUATION PROCESS

Significant emphasis is placed on the evaluation process to better accomplish the functions of the evaluation systems.

- The evaluation process incorporates three innovative features. First, it emphasizes the roles of both ends of the rating chain, the rated officer and the senior rater; second, it starts the evaluation process at the beginning of the rating period; finally, it uses, in addition to the OER (DA Form 67-8), a support form (DA Form 67-8-1) for use solely by the organizational rating chain, and a senior rater profile report (DA Form 67-8-2) for use by DA, NGB, and State headquarters.

- o The evaluation process starts at the beginning of the rating period when the rated officer receives a copy of DA Form 67-8-1 (support form) from the State Military Personnel Management Officer. The form will indicate the rating chain and be used as a worksheet for the initial discussion of duties and objectives between the rater and rated officer. The initial discussion between the rater and rated officer should take place as soon as possible, but not later than 30 days after the beginning of the rating period. During the rating period, duties and objectives should be revised and updated as the situation dictates.

At the end of a rating period:

- o The rated officer receives a DA Form 67-8 (OER) and a DA Form 67-8-1 (support form) from the State Military Personnel Management Officer. The rated officer completes the support form, verifies the administrative data and rating official's names on the OER, and forwards both forms to the rater.

- o The rater reviews DA Form 67-8-1 and enters any necessary comments. The rater may use the information on DA Form 67-8-1 as the basis for the duty description on DA Form 67-8 and considers the rated officer's comments when evaluating performance and potential on DA Form 67-8. The two forms are then forwarded to the intermediate rater, if one has been designated.

- o The intermediate rater reviews DA Form 67-8-1 and enters any necessary comments. The intermediate rater considers information on both forms when evaluating performance and potential on DA Form 67-8. The two forms are then forwarded to the senior rater.

- o The senior rater considers the information on both forms when evaluating the rated officer's potential on DA Form 67-8. The senior rater also administratively reviews DA Form 67-8 for discrepancies. When the senior rater has completed his evaluation and review, the DA Form 67-8-1 is returned to the rated officer and the DA Form 67-8 is forwarded to the State military personnel management officer for dispatch to NGB.

- o On arrival at NGB, the DA Form 67-8 is reviewed and the senior rater's profile (rating history) is placed on the form next to the senior rater's evaluation of the rated officer's potential. The report is then placed in the rated officer's OMPF and one copy forwarded to State headquarters for inclusion in the State management file. This information is also captured in the senior rater's profile.

PURPOSE AND USE OF DA FORM 67-8-1 (OER SUPPORT FORM)

DA Form 67-8-1 is a support form for use by the organizational rating chain. The primary purpose of the support form is to include the rated officer in the evaluation process and start the evaluation process at the beginning of the rating period.

- The support form is designed to:

- Increase planning and relate performance to mission. . .THROUGH. . .joint understanding between the rater and rated officer as to the duty description and major performance objectives at the beginning of the rating period.

- Encourage performance counseling/ coaching and best use of individual talent . . .BY. . .continuous communication during the rating period to update and revise the duty description and performance objectives.

- Provide information for rater, intermediate rater, and senior rater for use in making their evaluation.

- The principal method used by the 67-8-1 is the communication process between the rater and rated officer in developing the elements of the rated officer's performance. Through this process, the rated officer is made aware of the specific nature of the job and is provided the opportunity to influence the decisions as to what should be accomplished. For the rater, it is the process through which he gives direction to subordinates, systematically plans for accomplishing the mission, and gains valuable information about the status of the organization.

- Impetus for the communication process

is the requirement for the rated officer to complete 67-8-1 (support form) at the end of the rating period. This requirement reinforces the need to discuss the rated officer's input prior to the end of the rating period in order to insure that entries fall within command guidance and fit reality.

- DA Form 67-8-1 should be first used during the rating period as a worksheet to discuss the rated officer's duty description and major performance objectives. During the rating period, this information is used by the rated officer as a guide for performance. However, it should be emphasized that this guidance is not all inclusive, because the rated officer is still responsible for all that is normally expected of his grade and duty position.

- At the end of the rating period, the completed form (containing the rated officer's final description of his duties, major objectives, and significant contributions) accompanies the DA Form 67-8 (OER) from the rated officer through the rater and intermediate rater to the senior rater. When the senior rater completes his review of the support form, it is returned to the rated officer while the OER is sent to the State military personnel management officer for dispatch to NGB.

INCLUDES RATED OFFICER IN EVALUATION PROCESS.

STARTS THE EVALUATION PROCESS IN THE BEGINNING
OF THE RATING PERIOD.

ENHANCES MISSION ACCOMPLISHMENT.

ENCOURAGES PROFESSIONAL DEVELOPMENT.

PROVIDES GUIDE FOR RATED OFFICER PERFORMANCE.

ACCOMPANIES OER THRU RATING CHAIN.

NOT FORWARDED TO NGB.

DA FORM 67-8-1 (OER SUPPORT FORM)

PURPOSE AND USE OF DA FORM 67-8-1 (OER SUPPORT FORM) Continued

The requirement to establish and discuss duty descriptions and objectives resulting from the use of DA Form 67-8-1 provides a vehicle for increased mission related communication between the rater and rated officer over the entire rating period.

- The communication process is flexible enough to be adjusted to the local situation. The relationship between rater and rated officer is a product of the mission, the style and personality of the rater, the experience of the rated officer, etc. The process does not attempt to dictate any type of leadership style; rather, it is meant to suggest and capitalize on the benefits of increased mission-related communications, not only to both rated officer and rater, but also to the organization. For example, objectives can be sent by the rater, jointly developed by both rater and rated officer, or solicited from the rated officer.

- A specific example of the process which should be used as a guide is as follows:

- Soon after the assignment of either the rater or rated officer, the rater should conduct an initial interview with the rated officer to begin the development of appropriate rated officer objectives in support of the organization's mission.

- If the rated officer is the more recently assigned to the organization, the rater may, after discussing the organization's mission, problem areas, tasks, priorities, and similar matters; use pencil entries on 67-8-1 to outline a preliminary duty description and major objectives for future performance. The rated officer would then have a guide for performance during the introductory portion of the assignment and a

period of time to assess the adequacy or applicability of the duty description and objectives.

- If the rater is the more recently assigned, he might use the initial interview to solicit suggestions from the rated officer on the appropriate duty description and objectives. In this case, the rater will obtain a quicker view of the subordinate and the work situation, and be helped in developing the best duty description and performance objectives for that subordinate.

- In most cases, even the best developed duty description and performance objectives will be altered by the changing situation or unexpected developments. Therefore, it is probably necessary for the rater and rated officer to meet periodically to update the duty description or performance objectives to describe the latest situation accurately. If this is done properly, the result is improved communication and a greater awareness of the organizational situation.

- The ultimate objective is to establish an understanding between rater and rated officer as to what will be stated on the 67-8-1 at the end of the rating period. The process seeks to resolve, early in the rating period, lack of understanding and ambiguity. In most cases, differences in opinions will be resolved before completing this part of the form. However, if they are not resolved, the form will be completed with disagreements clearly stated.

UNDERSTANDING BETWEEN THE RATER AND RATED OFFICER
AS TO THE DUTY DESCRIPTION AND OBJECTIVES AT
THE BEGINNING OF THE RATING PERIOD.

CONTINUED COMMUNICATION DURING THE RATING PERIOD
TO UPDATE AND REVISE THE DUTY DESCRIPTION AND
PERFORMANCE OBJECTIVES.

AFTER THE FACT UNDERSTANDING AS TO WHAT OCCURRED
DURING THE RATING PERIOD.

DA FORM 67-8-1 COMMUNICATION PROCESS

The front side of DA Form 67-8-1 contains the rated officer and rating chain identification and provides for the rated officer's description of his duties, major objectives, and contributions during the rating period.

● PART I--IDENTIFICATION

○ Completed by State military personnel management officer.

● PART II--RATING CHAIN

○ The State military personnel management officer fills in name, rank, and position of rater and the duty positions of the intermediate rater and senior rater at the beginning of the rating period. At the end of each rating period a new form is prepared with the names of all the rating officials. This prevents a need to prepare new forms during the rating period because of changes in the intermediate or senior rater.

● PART III--RATED OFFICER

○ Block a--The rated officer describes his significant duties and responsibilities. This description will include not only primary duties, but also major additional duties. It is meant to address the type of work required, not frequently changing specific tasks. Duty descriptions on evaluation reports are very

important to DA, NGB, and State headquarters' selection boards and career managers. Descriptions must be clear and concise, emphasizing specific functions required of the rated officer while noting conditions peculiar to the assignments. It is the rated officer's opportunity and responsibility to report the job as it really exists.

○ Block b--The rated officer indicates major performance objectives for the rating period. These are the most important tasks, priorities, and major areas of concern and/or responsibility associated with the performance. This is in effect the rated officer's viewpoint of how he will accomplish the duties described in block a.

○ Block c--The rated officer describes his major contributions. This is not intended to be an item-by-item check of the objectives in block b, but rather those things that the rated officer feels were his/her major accomplishments. The contributions should address the duties and responsibilities of the position focusing on accomplishment of the organization mission and other areas.

OFFICER EVALUATION REPORT SUPPORT FORM

For use of this form, see AR 623 105, proponent agency is US Army Military Personnel Center.

Read Privacy Act Statement and Instructions on Reverse before Completing this form.

PART I - RATED OFFICER IDENTIFICATION

NAME OF RATED OFFICER (Last, First, MI): SMITH, John A.	GRADE CPT	PRINCIPAL DUTY TITLE Company Commander	ORGANIZATION C Co, 1st Bn, 8th Inf Div
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PART II - RATING CHAIN - YOUR RATING CHAIN FOR THE EVALUATION PERIOD IS:

RATER	NAME DOE, John W.	GRADE LTC	POSITION Cdr, 1st Bn, 8th Inf Div
INTERMEDIATE RATER	NAME	GRADE	POSITION
SENIOR RATER	NAME JONES, Jake W.	GRADE COL	POSITION Cdr, 2d Bde, 8th Inf Div

RATED OFFICER'S SPECIALTIES/MOS 11 DUTY SSI/MOS 11B

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

a. STATE YOUR SIGNIFICANT DUTIES AND RESPONSIBILITIES

Commander of an Infantry Company - Responsible for developing the company into a cohesive, effective, combat-ready unit. Is responsible for training, administration, supply, maintenance, transportation, and security activities of the unit. Also responsible for maintaining unit strength at a high level through recruiting and retention programs.

b. INDICATE YOUR MAJOR PERFORMANCE OBJECTIVES

- o Develop and execute a training program which will enable the company to perform all ARTEP tasks at or above prescribed standards.
- o Train subordinate leaders of the company in their jobs, require them to perform the full scope of their assigned duties.
- o Increase enlisted strength within the unit.
- o Eliminate wasted time during drill periods by better utilization of leaders and training facilities.
- o Reduce vehicle dead-line rate by better assignment of maintenance tasks and decentralized execution.
- o Improve supply accountability within the unit.
- o Improve the operation of the unit mess hall and quality of food.
- o Ensure compliance of all unit personnel with weight standards and improve the physical fitness program in the unit.

c. LIST YOUR SIGNIFICANT CONTRIBUTIONS

Have improved training by prior planning and rehearsal of instructors. Have improved morale of the unit by conducting more realistic and exciting hands-on training. The unit received outstanding evaluations during ARTEP exercises at AT 80. Established a rigorous training program for company officers in all facets of company functions. Have now delegated much authority to company officers in all areas of supply, administration, training, and maintenance with excellent results. Unit maintenance, supply, mess, and administration were rated as outstanding in the recent AGI conducted by the IG. The unit strength has increased by 10% and retention has increased by reenlisting 75% of those individuals eligible. Established a system of hand receipts down to user level on all items of company equipment, thereby, reducing losses to zero during the last six months.

John A. Smith 178288C
(Signature and Date)

DA FORM 67-8-1 (OER SUPPORT FORM)--Reverse Side

The reverse side of DA Form 67-8-1 provides for rater and intermediate rater comments on the rated officer's input, as well as instructions for completing the OER support form.

- PART IV--This space is for comments by the rater and/or intermediate rater on the entries of the rated officer in PART III. These comments are optional. If comments are made, they should address the accuracy of the duty description and performance objectives. Comments on performance should be reserved for the OER; however, if included in this part, they should be consistent with the evaluations on the OER.

Whether or not comments are made, the rater and intermediate rater must sign the form. Signatures do not show concurrence with PART III, but indicate that the rated officer's comments have been reviewed.

- INSTRUCTIONS--This section contains guidelines for completing the OER and support form as well as information concerning their purpose and use.

PART IV - RATER AND/OR INTERMEDIATE RATER (Review and comment on Part III a, b, and c above.
Insure remarks are consistent with your performance and potential evaluation on DA Form 67-8.)

a. RATER COMMENTS (Optional)

CPT Smith's excellent recruiting and retention programs have been adopted for use by the entire battalion with outstanding results.

John W. Doe 19 Sep 80
SIGNATURE AND DATE (Mandatory)

b. INTERMEDIATE RATER COMMENTS (Optional)

SIGNATURE AND DATE (Mandatory)

DATA REQUIRED BY THE PRIVACY ACT OF 1974 (5 U.S.C. 552a)

- 1. AUTHORITY:** Sec 301 Title 5 USC; Sec 3012 Title 10 USC.
- 2. PURPOSE:** DA Form 67-8, Officer Evaluation Report, serves as the primary source of information for officer personnel management decisions. DA Form 67-8-1, Officer Evaluation Support Form, serves as a guide for the rated officer's performance, development of the rated officer, enhances the accomplishment of the organization mission, and provides additional performance information to the rating chain.
- 3. ROUTINE USE:** DA Form 67-8 will be maintained in the rated officer's official military Personnel File (OMPF) and Career Management Individual File (CMIF). A copy will be provided to the rated officer either directly or sent to the forwarding address shown in Part I, DA Form 67-8. DA Form 67-8-1 is for organizational use only and will be returned to the rated officer after review by the rating chain.
- 4. DISCLOSURE:** Disclosure of the rated officer's SSAN (Part I, DA Form 67-8) is voluntary. However, failure to verify the SSAN may result in a delayed or erroneous processing of the officer's OER. Disclosure of the information in Part IIIc, DA Form 67-8-1 is voluntary. However, failure to provide the information requested will result in an evaluation of the rated officer without the benefits of that officer's comments. Should the rated officer use the Privacy Act as a basis not to provide the information requested in Part IIIc, the Support Form will contain the rated officer's statement to that effect and be forwarded through the rating chain in accordance with AR 623-105.

INSTRUCTIONS

PART I: Identification - Self explanatory.

PART II: Rating Chain - The personnel officer or appropriate administrative office will fill in information based on the commander's designated rating scheme.

PART IIIa: Rated Officer Significant Duties and Responsibilities - State the normal requirements met in your specific position as well as any important additional duties. Address the type of work required, rather than frequently changing specific tasks.

PART IIIb: Rated Officer Major Performance Objectives - List the most important tasks, priorities, and major areas of concern and responsibility assigned. This is an explanation of how you set out to accomplish the duties described in IIIa. Ideally these are planned goals that you will work toward in an effort to make a contribution to the accomplishment of the organization mission; however, they may be in reaction to unpredictable changes. The objectives come from the following four categories.

ROUTINE - Objectives that address the repetitive and commonplace duties that must be carried out. These are duties that will produce less visible results, but will have serious consequences if not properly executed.

PROBLEM SOLVING - Objectives that provide for dealing with problem situations. The objective should plan for or address potential problems so that time is available to deal with them without disrupting other objectives.

INNOVATIVE - Objectives that create new or improved methods of operation in the organization.

PERSONAL DEVELOPMENT - Objectives that further professional growth of an individual or his/her subordinates.

PART IIIc: Rated Officer Significant Contributions - Describe the most significant contributions you made during the rating period. These may have been in support of the objectives established or may highlight other accomplishments that you feel are important.

PART IV: Rater and/or Intermediate Rater Review and Comment - Insure any remarks are consistent with your performance and potential evaluation on DA Form 67-8. Signature does not show concurrence with Part III but indicates that you have reviewed the rated officer's portion of the form.

EXAMPLE OF COMPLETED SUPPORT FORM - REVERSE SIDE

PURPOSES OF DA FORM 67-8

The primary purpose of DA Form 67-8 is to provide management information to DA, NGB, and State headquarters. It is also designed to support the specialty focus of OPMS-ARNG and reinforce professionalism in the officer corps.

- The primary purpose of DA Form 67-8 is also the primary purpose of the Officer Evaluation Reporting System and the basic reason for the existence of an officer evaluation report. This purpose is achieved, as in past systems, by rating officials in the field recording their evaluations of the rated officer on a form which is later reviewed as part of the rated officer's entire file by DA, NGB, and State career managers and selection boards.
- DA Form 67-8 also provides evaluative information to each successive member of the rating chain. As the DA Form 67-8 is forwarded through the rating chain, each rating official considers the evaluation(s) already recorded on the form.
- Professionalism is reinforced through the use of a comprehensive description of professionalism for the Army officer.
- Support for the specialty focus of OPMS-ARNG is accomplished by comparing the rated officer's specialties with the specialty requirements of the duty assignment.

PROVIDE MANAGEMENT INFORMATION FOR
SELECTION AND ASSIGNMENT DECISIONS.

PROVIDE EVALUATIVE INFORMATION TO EACH
SUCCESSIVE MEMBER OF THE RATING CHAIN.

REINFORCE PROFESSIONALISM IN THE OFFICER
CORPS.

SUPPORT SPECIALTY FOCUS OF OPMS - ARNG.

PURPOSES OF DA FORM 67-8

PART I, ADMINISTRATIVE DATA

Part I contains administrative data and includes the identification of the rated officer, rating period, and reason for submission of the report.

- Part I is completed by the State military personnel management officer.
- Detailed Instructions, Part I. Administrative Data: With the exception of item o, all of the following items must be completed prior to forwarding the report to the rated officer for authentication:
 - Items a, b, and i. Self-explanatory.
 - Item c. Enter authorized abbreviation (e.g., CPT, LTC).
 - Item d. Enter date of rank for grade in which serving as of the thru date of the report.
 - Item e. Enter authorized basic branch abbreviation.
 - Item f. Specialty codes which identify the rated officer's designated specialties will be entered in this block.
 - Item g. Enter PMOS for warrant officers.
 - Item h. Enter appropriate code for the rated officer's station. (See DA Pam 525-12.)
 - Item j. Enter the code and reason the report is being submitted. The most frequently used codes and designations are given below:

<u>Code</u>	<u>Designation</u>
03	Change in Rater--add "Change in Rater"
04	Change in Duty--add "Change in Duty"
05	Annual Report--add "Annual"
06	Departure on TDY Under a Different Rater--add "TDY"
14	Initial Tour on Extended Active Duty Evaluation--add "Initial"
21	Optional Complete-the-Record Report--add "Complete the Record"

(See AR 623-105 for other codes not listed here.)

PART I - ADMINISTRATIVE DATA													
a. LAST NAME FIRST NAME MIDDLE INITIAL SMITH, John, A.				b. SSN 123-45-6789		c. GRADE CPT	d. DATE OF RANK Year: 76, Month: 5, Day: 4			e. BR IN	f. DESIGNATED SPECIALTIES 11	g. PMOS (WO)	h. STA CODE 56123
i. UNIT ORGANIZATION STATION, ZIP CODE OR APO, MAJOR COMMAND C Company, 1st Battalion, 8th Infantry Division, Fort Fox, WY 82001							j. REASON FOR SUBMISSION 05 ANNUAL				k. COMD CODE OT		
l. PERIOD COVERED						m. NO. OF MONTHS	n. MILPO CODE	o. RATED OFFICER COPY (Check one and date)			p. FORWARDING ADDRESS		
FROM			THRU					<input checked="" type="checkbox"/> 1. GIVEN TO OFFICER 25 Sep 80 <input type="checkbox"/> 2. FORWARDED TO OFFICER					
Year	Month	Day	Year	Month	Day								
79	9	16	80	9	15	12	56						
q. EXPLANATION OF NONRATED PERIODS													

EXAMPLE OF COMPLETED PART I, DA FORM 67-8

The basic minimum period of evaluation is 120 calendar days for all ARNG officers. To determine if the rated officer has the number of days needed for a report, determine the rating period. That is, count the number of calendar days the rated officer has served under his present rater in his present duty position since the beginning of the rating period. Deduct from this total all nonrated periods totaling 30 or more consecutive days that occur during the rating period (e.g., leave, hospital - see para 8-21b AR 623-105). Do not count nonrated periods that occurred prior to the rating period. If the resulting number of days is equal to or greater than 120 or more days, a report may be submitted.

o Item k. Enter "OT" for rated officer's major command. (See appendix J AR 623-105 for additional codes.)

o Item l. "From" date is the day following the last day ("thru" date) in the preceding report. "Thru" date is the date prior to the event which causes submission of the report.

o Item m. Enter the number of rated months. This is determined by computing the basic period of evaluation, as described above, and dividing this number by 30. In this regard, 15 or more days will be rounded upward and counted as a whole month.

o Item n. Enter two character numeric State code. (See NGB PAM 680-3, page D-3.)

o Item o. Check box indicating disposition of rated officer copy of report.

o Item p. Enter the forwarding address provided by the rated officer, only if the latter has left before receiving a copy of the completed OER.

o Item q. List and explain nonrated periods as described in para 8-21b AR 623-105.

PART II, AUTHENTICATION

Part II provides for authentication by the rated officer and rating officials after they have completed their portion(s) of the form at the end of the rating period.

- In Part II, authentication, the State military personnel management officer enters the names, ranks, positions, and SSN's of the rating officials.

- Detailed Instructions.

- Prior to initiating the report, the State military personnel management officer will insure that data identifying rating officials is accurate, and duty assignment entries reflect position titles.

- The rated officer signs and dates the report prior to forwarding it to the rater. His signature verifies that the administrative data in Part I and the rating officials in Part II are correct. This action increases the administrative accuracy of the OER, since the rated officer is most familiar with and interested in this information. Confirmation of the administrative data should also eliminate an appeal by the rated officer based on inaccurate administrative data.

- If the rated officer refuses or is not available to sign the DA Form 67-8, the report will be forwarded without the rated officer's signature, and the senior rater will explain in Part VII, DA Form 67-8, why the rated officer did not sign the report.

- The rater and, if designated, the intermediate rater will, in turn, complete the report and verify all data provided elsewhere on the form prior to signing, dating, and passing the report to the senior rater. The date entered will not be prior to the rated officer's authentication date.

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

- After the OER has been completed, the State military personnel management officer will insure that each rating official has signed the report. Additionally, he will advise the appropriate rating official(s) of any discrepancies which have been noted before further processing the report.

PART II - AUTHENTICATION (Rated officer signature verifies PART I data and RATING OFFICIALS ONLY)					
a. NAME OF RATER (Last, First, MI)	SSN	SIGNATURE			
DOE, John W.	132-45-6789	John W. Doe			
GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT					DATE
LTC, IN, 1st Battalion, 8th Infantry Division, BN CO					19 Sep 80
b. NAME OF INTERMEDIATE RATER (Last, First, MI)	SSN	SIGNATURE			
GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT					DATE
c. NAME OF SENIOR RATER (Last, First, MI)	SSN	SIGNATURE			
JONES, Jake W.	142-45-6789	Jake W. Jones			
GRADE, BRANCH, ORGANIZATION, DUTY ASSIGNMENT					DATE
COL, IN, 2d Brigade, 8th Infantry Division, BDE CO					22 Sep 80
d. SIGNATURE OF RATED OFFICER	DATE	e. DATE ENTERED ON DA FORM 2-1	f. RATED OFFICER MPO (INITIALS)	g. SR MPO INITIALS	h. NO. OF INCL.
John A. Smith	17 Sep 80	24 Sep 80	JK		0

EXAMPLE OF COMPLETED PART II, DA FORM 67-8

o Rating officials who sign the form but do not give a rating or who submit their evaluations on a letter report will place an "X" in the small block on the left side of their respective signature blocks. (This block is used to control the automated editing of the report at NGB). Otherwise the block will be left blank.

PART III, DUTY DESCRIPTION

Part III provides for the duty description of the rated officer by the rater.

- Detailed Instructions.

- o Items a and b. Enter principal duty title and duty SSI/MOS which identify the rated officer's duty position. The duty title and SSI/MOS will be taken from Item 35, DA Form 2-1.

- o Item c. It is the responsibility of the rater to provide a formal, detailed description of the rated officer's duties and

responsibilities. Descriptions must be clear and concise emphasizing specific functions required of the rated officer, while noting conditions peculiar to the assignment. The description will include, as a minimum, descriptions of both principal duties and major additional duties. Most raters will be able to use Part IIIa of DA Form 67-8-1 to assist them in completing this section.

PART III - DUTY DESCRIPTION (Rate)	
a. PRINCIPAL DUTY TITLE	Company Commander
b. SSI/MOS	11B
c. REFER TO PART IIIa, DA FORM 67-8-1	
<p>Commander of an Infantry Company - Responsible for developing the company into a cohesive, effective, combat-ready unit. Is responsible for training, administration, supply, maintenance, transportation, and security activities of the unit. Responsible for maintaining unit strength at a high level through recruiting and retention programs.</p>	

EXAMPLE OF COMPLETED PART III, DA FORM 67-8

PART IV, PERFORMANCE EVALUATION--PROFESSIONALISM

Part IV contains a listing of those attributes which define professionalism for the Army officer.

Part IV contains a comprehensive description of professionalism for the Army officer. These are universal and apply across all grades, positions, branches, and specialties and must be considered in the evaluation of any officer. The major impact of considering these attributes when rating an officer is to emphasize and reinforce professionalism.

Mechanics:

- Block a--Indicate on a scale of one to five, one being high, the degree to which each statement is descriptive of the rated officer. Any necessary elaboration of strengths or weaknesses will be placed in the comments portion of block b.
- Block b--Comment on any of the eight professional ethics where the rated officer is particularly outstanding or needs improvement.

Definitions of professional ethics:

DEDICATION--Commitment to the goal and missions of the Army and the country.

RESPONSIBILITY--Acceptance of complete responsibility for mission and welfare of organization.

LOYALTY--Faithful and willing support of subordinates, peers, and superiors.

DISCIPLINE--Willing and intelligent obedience to regulations and lawful orders, and the initiation of appropriate actions in the absence of orders.

INTEGRITY--Honesty in word and deed.

MORAL COURAGE--Willingness to candidly state and resolutely support one's convictions; not a yes man.

SELFLESSNESS--Willingness to subordinate self and career for mission and organization.

MORAL STANDARDS--Maintains high standards of personal conduct both on and off duty.

PART IV - PERFORMANCE EVALUATION - PROFESSIONALISM (Rater)					
a. PROFESSIONAL COMPETENCE <i>(In Items 1 through 14 below, indicate the degree of agreement with the following statements as being descriptive of the rated officer. Any comments will be reflected in b below.)</i>	HIGH DEGREE		LOW DEGREE		
	1	2	3	4	5
1. Possesses capacity to acquire knowledge/grasp concepts	1				1
2. Demonstrates appropriate knowledge and expertise in assigned tasks	1				1
3. Maintains appropriate level of physical fitness	1				1
4. Motivates, challenges and develops subordinates	1				1
5. Performs under physical and mental stress	1				1
6. Encourages candor and frankness in subordinates	2				1
7. Clear and concise in written communication	2				1
8. Displays sound judgment					1
9. Seeks self-improvement					1
10. Is adaptable to changing situations					1
11. Sets and enforces high standards					1
12. Possesses military bearing and appearance					1
13. Supports EO/EEO					1
14. Clear and concise in oral communication					1
b. PROFESSIONAL ETHICS <i>(Comment on any area where the rated officer is particularly outstanding or needs improvement)</i>					
1. DEDICATION 2. RESPONSIBILITY 3. LOYALTY 4. DISCIPLINE 5. INTEGRITY 6. MORAL COURAGE 7. SELFLESSNESS 8. MORAL STANDARDS AROS	An officer of unquestionable integrity who honestly states his opinions and defends his beliefs, but once a decision is made, supports it 100%.				

DA FORM 67-8
1 SEP 79

REPLACES DA FORM 67-7, 1 JAN 73, WHICH IS OBSOLETE, 1 NOV 78.

US ARMY OFFICER EVALUATION REPORT

EXAMPLE OF COMPLETED PART IV, DA FORM 67-8

PART V, PERFORMANCE AND POTENTIAL EVALUATION

Part V provides for the rater's evaluation of the rated officer's performance and potential.

- Block a--State military personnel management officer indicates rated officer's name, SSN, and whether the specialty or MOS for the assigned duty is one of the rated officer's specialties or MOS's.
- Block b--By placing an X in the appropriate box, the rater compares the rated officer's performance against the duty requirements. The focus is on results achieved and the manner by which they were achieved.
- Block c--Rater comments on specific aspects of performance. As a minimum, the comments should address the key items mentioned in the duty description in Part III and as appropriate, the duty description, objectives, and contributions portions of the OER support form. Comments on potential are not permitted in this block.
- Block d--Rater evaluates the rated officer's potential by placing an X in the appropriate box. Evaluation of potential consists of an assessment of the rated officer's ability to perform in positions of greater responsibility, relative to his contemporaries, both at higher grades and within his current grade. In effect, it consists of a projection of the rated officer's demonstrated performance into some future position or grade of higher responsibility and comparing his anticipated performance with that which is anticipated of his contemporaries. The primary focus of this assessment is the capability of the officer to meet increasing responsibility in relation to his peers.
- Block e--Rater amplifies his evaluation of the rated officer's potential.

PART VI, INTERMEDIATE RATER

Part VI is completed by the intermediate rater.

- Block a--The intermediate rater comments on the rater officer's performance and/or potential. (In most cases, as in the examples contained in this pamphlet, there will be no intermediate rater, and this part will be blank.)

PERIOD COVERED 790916 thru 800915	
PART V - PERFORMANCE AND POTENTIAL EVALUATION (Rater)	
RATED OFFICER'S NAME SMITH, John A. SSN 123-45-6789	
RATED OFFICER IS ASSIGNED IN ONE OF HIS/HER DESIGNATED SPECIALTIES/MOS <input checked="" type="checkbox"/> YLS <input type="checkbox"/> NO	
PERFORMANCE DURING THIS RATING PERIOD REFER TO PART III, DA FORM 67-8 AND PART III a, b, AND c, DA FORM 67-8-1 <input type="checkbox"/> ALWAYS EXCEEDED REQUIREMENTS <input checked="" type="checkbox"/> USUALLY EXCEEDED REQUIREMENTS <input type="checkbox"/> MET REQUIREMENTS <input type="checkbox"/> OFTEN FAILED REQUIREMENTS <input type="checkbox"/> USUALLY FAILED REQUIREMENTS	
COMMENT ON SPECIFIC ASPECTS OF THE PERFORMANCE: REFER TO PART III, DA FORM 67-8 AND PART III a, b, AND c, DA FORM 67-8-1. DO NOT USE FOR COMMENTS ON POTENTIAL! <p>CPT Smith is an outstanding performer. Since assuming command he has improved the combat-readiness posture of his company to the degree that it is one of the finest units in the battalion. His unit met and surpassed all evaluation standards on the ARTEP and received very high praise from evaluators at Annual Training 80. The company's superb performance on these exercises can be attributed to CPT Smith's technical competence and leadership. His company received outstanding evaluations in the areas of supply, mess, and administration by the IG during the recent AGI. He contributed directly to the professional development of his junior officers by providing rigorous training and continuous counselling enabling them to perform at their maximum level. He also developed NCO's through formulation of detailed training programs that were integrated into routine work assignments. The unit strength increased dramatically through an excellent recruiting program developed by CPT Smith, and reenlistments increased 75% under his leadership. CPT Smith has also made a great improvement in his unit supply accountability and has reduced losses of equipment to zero in the past 6 months.</p>	
THIS OFFICER'S POTENTIAL FOR PROMOTION TO THE NEXT HIGHER GRADE IS <input type="checkbox"/> PROMOTE AHEAD OF CONTEMPORARIES <input checked="" type="checkbox"/> PROMOTE WITH CONTEMPORARIES <input type="checkbox"/> DO NOT PROMOTE <input type="checkbox"/> OTHER (Explain below)	
COMMENT ON POTENTIAL <p>This officer should continue to receive assignments that will ensure the development of his potential for high level command and staff. Recommend CPT Smith be allowed to attend the resident United States Army Command and General Staff College.</p>	

EXAMPLE OF COMPLETED PART V, DA FORM 67-8

PART VI - INTERMEDIATE RATER
COMMENTS

PART VI, DA FORM 67-8

PART VII, SENIOR RATER

Part VII provides for senior rater's evaluation of the rated officer's potential and for any other comments that enhance the evaluation of the rated officer.

- The senior rater has the role of not only administrative review and arbitration, but also the responsibility to assess the potential of the rated officer.
- Information contained on DA Form 67-8-1 (which will accompany the OER) can be used to assist the senior rater in fulfilling these responsibilities.
- Block a--The Senior Rater--The Senior rater assesses the potential of the rated officer by comparing his performance against all other officers of the same grade using a 100-officer model. The evaluation is accomplished by placing an X in the appropriate box in the column marked SR. The senior rater will also signify receipt and review of the rated officer's DA Form 67-8-1 by placing an X in Part VII.

Senior Rater Profile--NGB will maintain

a daily updated profile on each senior rater. This profile will be entered in the column marked "DA Use Only" on each report as it is received by NGB. The profile provides both selection boards and managers with a comparison of a specific rating and the senior rater's normal rating tendencies. Therefore, it places the assessment of the rated officer's potential in perspective from the standpoint of how the senior rater normally evaluates potential for officers of the same grade as the rated officer. Additionally, NGB will maintain statistics on each senior rater for use in managing the system.

- Block b--The senior rater enters comments in this block. In most cases, these comments address the potential evaluation but may address performance, the administrative review, or the evaluations of the rater and intermediate rater.

(Notice that although CPT Smith was not placed in the top box, the profile indicates he was considered by the senior rater to be among the top 10% of captains rated by the senior rater at the time the report was received by NGB.)

A. POTENTIAL EVALUATION (See Chapter 1, ARNGUS 19-1)		PART VII - SENIOR RATER		B. COMMENTS
SR		DA USE ONLY		
X		HI	1	CPT Smith is one of the most effective Company Commanders in the Brigade. His company is frequently singled out for its outstanding performance in training during AT and during IG inspections. He should be promoted as soon as possible.
			3	
			9	
			12	
			10	
			2	
			1	
			0	
		LO	0	
A COMPLETED DA FORM 67-8 WAS RECEIVED WITH THIS REPORT AND CONSIDERED IN MY EVALUATION AND REVIEW <input checked="" type="checkbox"/> YES <input type="checkbox"/> No (if option is to be)				

EXAMPLE OF COMPLETED PART VII, DA FORM 67-8

● Review Function

- Normally the senior rater will accomplish the final chain of command review.
- Additional reviews will be provided in the following cases:
 - When the senior rater is an Army officer and is also performing as the rater, NGB will provide an additional review.
 - When the senior rater is not an ARNGUS officer, an additional review will be provided, using an addendum, by the first ARNGUS officer above the senior rater in the chain of command. If no ARNGUS is available above the senior rater in the chain of command, an additional review will be provided by NGB.
 - When relief is directed by the senior rater or an officer senior to the senior rater, the relief report will be reviewed, using an addendum, by the next senior officer (preferably ARNGUS) in the chain of command.

PURPOSES AND USE OF DA FORM 67-8-2 (SENIOR RATER PROFILE REPORT)

DA Form 67-8-2 is used by DA to track each senior rater's profile.

The purposes of DA Form 67-8-2 are:

- Track the rating history of each senior rater and make this information available to both the senior rater and DA, NGB, and State headquarters.
- Emphasize the importance of the senior rater's responsibility to provide credible evaluative information to DA, NGB, and State headquarters. This responsibility is one of the senior rater's most important, in that it affects the selection of the ARNG's future leadership and has a critical impact on the manner in which the ARNG accomplishes its missions.
- Assist in controlling rating inflation.

- Provide for systems monitoring and research.

DA Form 67-8-2 will be produced annually for each senior rater in the Active Army, USAR, and ARNG. The form will include all senior rater evaluations that have reached NGB as of a specified cutoff date.

Copies of the form will be:

- Made available to the senior rater.
- Placed in senior rater's Official Military Personnel File (OMPF).
- Made available to the State headquarters for inclusion in the State management file.

ADDITIONAL GUIDANCE FOR THE RATED OFFICER, RATER, AND SENIOR RATER

RATED OFFICER

- In essence, there are two formal requirements associated with the communication process and the Support Form (DA Form 67-8-1). You are responsible for:

- Initiating discussion with your rater within the first 30 days of the rating period concerning your duty description and major performance objectives.

- Completing the duty description, major performance objectives, and significant contributions portions of the support form at the end of the rating period.

- The information resulting from discussions with your rater is primarily intended to serve as a guide for performance. It is not necessarily all inclusive. You are still responsible for all that is normally expected of your grade and duty position.

- During the rating period, it is very much

in your best interest to insure the information concerning your duty description and major performance objectives is kept current to reflect changes in missions, emphasis, etc. (This may require additional discussion(s) with your rater.) By keeping this information current, the task of completing the form at the end of the rating period will be made easier and less time consuming.

- At the end of the rating period, prompt completion of your support form and verification of the administrative data on the OER is essential. It is your decision as to exactly what information you place on the support form. However, the information should establish the parameters and highlights of your performance to include major additional duties. By emphasizing the most important aspects of your performance, you have an excellent opportunity to highlight what you have accomplished, or have attempted to accomplish, to your rating chain.

RATER

- The communication process associated with the use of the support form provides you with an excellent opportunity to insure that your directions are clearly understood and that pertinent perceptions and suggestions from the rated officer are surfaced for consideration. In developing the rated officer's duty description and objectives, you have considerable latitude. You may develop them yourself, solicit suggestions from the rated officer, or task the rated officer to develop them. Your method depends entirely on the situation, your leadership style, the experience of the rated officer, etc.

- During the rating period, the duty description and major performance objectives should be kept current. This provides you with an excellent opportunity to coach/counsel the rated officer and give him the benefit

of your knowledge and experience. Traditionally, the most effective discussions of this type are "forward looking", focusing on what has yet to be done in order to accomplish your organizational mission(s).

- At the end of the rating period, the support form (completed by the rated officer) should be reviewed in detail. The information provided on this form should assist you in writing a more accurate and completed OER. If the information contained on the form is inadequate or inaccurate, it is appropriate to discuss this with the rated officer and to suggest changes. (Clarification of your expectations and improvement of the rated officer input, even at the last moment, is desirable.) However, the information contained on the support form is the responsibility of the rated officer, and changes cannot be forced over his objections.

- Comments on Part IV of the support form are optional. Part IV is primarily designed to report any unresolved disagreement between you and the rated officer concerning his duty description and/or major performance objectives. If comments are made, they should address the accuracy of the duty descriptions and performance objectives. Comments on performance should be reserved for the OER; however, if included in this part, they should be consistent with the evaluations on the OER. Whether or not comments are made, you must sign the form. Your signature does not show concurrence with Part III, but indicates that the rated officer's comments have been reviewed.

- Remember that the support form is

SENIOR RATER

- As the senior rater, you are responsible for both the final rating chain review and a critical evaluation of the rated officer's potential. This responsibility has been placed upon you to capitalize on your additional experience, broad organizational perspective, and tendency to focus on the organizational requirements and actual performance results.

- To assist you with the evaluation responsibility, you are being provided with specific information from the rated officer on a support form. This information is meant to supplement that which you have from more traditional means; i.e., personal observation, reports and records, the rater, etc.

- You are required to compare the potential of the rated officer against a population of 100 officers of the same grade. This 100-officer model has been established in recognition of the fact that across the entire officer corps there is a normal distribution in terms of quality and potential. While your organization may have more than a proportionate share of higher quality officers, causing your ratings to be clustered in the upper portion of the model, it is extremely unlikely that all, or even most, of your officers are one in 100 or top box.

- Your rating record will be displayed

only a guide to performance; it is focused on the major thrust and direction of performance. The rated officer is still responsible for and should be evaluated on all that is normally expected of an officer of that grade serving in the specific duty position, regardless of whether or not it is mentioned on the support form.

- A final note concerning Part V of the OER. This narrative differs from narratives of previous forms. It should be used to comment on the specifics of the performance. What did the rated officer actually do, and how well did he do it? Normally, the information contained on the support form will assist you in better completing this portion of the OER.

on each OER you complete in order to provide selection boards with your general rating tendency. This record will include the report on which it is placed and all reports previously written by you and accepted by NGB. Therefore, it is extremely important that you establish your standards and criteria early and be consistent. Sudden changes in your rating standards; e.g., rating one group of officers using tough standards and the next group of officers with relaxed standards, introduces an aberration into the system and may communicate false impressions to selection boards.

- Your rating record will also be placed on your OMPF and State management file. This is being accomplished to emphasize that the evaluation of subordinates is one of your most important responsibilities in that it affects the selection of the future leadership of the ARNG and has a critical impact on the manner in which the ARNG accomplishes its missions. The extent to which you accept the responsibility to provide credible evaluation information to DA, NGB, and State headquarters is, in itself, an indication of performance and will be included with all other pertinent performance information in your file for review by selection boards.

OFFICER EVALUATION REPORT SUPPORT FORM

For use of this form, see AR 623-106; proponent agency is US Army Military Personnel Center.

Read Privacy Act Statement and Instructions on Reverse before Completing this form.

PART I - RATED OFFICER IDENTIFICATION

NAME OF RATED OFFICER (Last, First, MI) HARRIS, James R.	GRADE 2LT	PRINCIPAL DUTY TITLE Platoon Leader	ORGANIZATION C Co, 1st Bn, 8th Inf Div
---	--------------	--	--

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

RATER	NAME SMITH, John A.	GRADE CPT	POSITION Cdr, C Co, 1st Bn, 8th Inf Div
INTERMEDIATE RATER	NAME	GRADE	POSITION
SENIOR RATER	NAME DOE, John W.	GRADE LTC	POSITION Cdr, 1st Bn, 8th Inf Div

RATED OFFICER'S SPECIALTIES/MOS 11 DUTY SSI/MOS 11B

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

a. STATE YOUR SIGNIFICANT DUTIES AND RESPONSIBILITIES

Infantry Platoon Leader - Responsible for molding the platoon into an effective fighting force. Develop, implement, and supervise individual and collective training programs which ensure the platoon gains and maintains a high state of combat readiness and is capable of accomplishing all assigned missions. Major additional duty is serving as company training officer.

b. INDICATE YOUR MAJOR PERFORMANCE OBJECTIVES

- oInstitute both a collective and individual training program which fully prepares the platoon for the ARTEP and SQT.
- oSupervise and improve the platoon's maintenance program.
- oPrepare the platoon for the upcoming live-fire exercise at Fort Bradley.
- oImprove enlisted strength of the platoon and increase retention rates of current members.
- oConduct frequent counselling sessions with squad leaders and improve their performance and professionalism.
- oAssist in the development of a company training program which effectively utilizes time available during drills and provides well-planned and realistic training to improve the motivation and individual proficiency of the soldier.

c. LIST YOUR SIGNIFICANT CONTRIBUTIONS

During the last SQT, the platoon significantly increased the number of individuals verifying their current skill level and qualifying for the next higher skill level. The platoon successfully met or exceeded the standards in the ARTEP during AT 80 in all but two missions and was commended by the senior evaluator for the execution of the raid and ambush missions. The platoon maintenance program has significantly improved equipment appearance, reliability, and availability. Live-fire exercises conducted at Fort Bradley was the best training the platoon soldiers received this year, and the soldiers really benefited from the training. The squad leaders of the platoon have all improved their performance, with 3 of them attending the NCO Academy. The platoon strength has improved with 10 new enlistments and only 1 loss. In conjunction with the Company Commander, 1SG, and other platoon leaders, a challenging and interesting training program has been developed and executed by the company.

James R. Harris 15 Sep 80
(Signature and Date)

OFFICER EVALUATION REPORT SUPPORT FORM

For use of this form, see AR 623-105; proponent agency is US Army Military Personnel Center.

Read Privacy Act Statement and Instructions on Reverse before Completing this form.

PART I - RATED OFFICER IDENTIFICATION

NAME OF RATED OFFICER (Last, First, MI) CRAY, Harold C.	GRADE LTC	PRINCIPAL DUTY TITLE Division G-1	ORGANIZATION HQ, 8th Inf Div
--	--------------	--------------------------------------	---------------------------------

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

RATER	NAME BLACK, Robert O.	GRADE COL	POSITION C of S, HQ, 8th Inf Div
INTERMEDIATE RATER	NAME	GRADE	POSITION
SENIOR RATER	NAME WHITE, Dennis P.	GRADE MG	POSITION CG 8th Inf Div

RATED OFFICER'S SPECIALTIES/MOS 11 41 DUTY SSI/MOS 41A

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

a. STATE YOUR SIGNIFICANT DUTIES AND RESPONSIBILITIES

Formulates or assists in the formulation of military plans, policies, and procedures and supervises their execution at the General Staff level. Responsible for the procurement of personnel, individual training, education, proper utilization, and motivation of divisional units. Directs recruiting and induction operations. Advises and assists commander on human resource development activities relating to leadership and discipline; job and career satisfaction; community services; maintenance of law and order.

b. INDICATE YOUR MAJOR PERFORMANCE OBJECTIVES

- o Improve the coordination and cooperation between the division staff elements to ensure staff actions are processed in a professional, timely, and efficient manner.
- o Develop and implement a plan for orientating all newly assigned personnel.
- o Closely monitor and assist in improving recruiting activities and procedures throughout the division.
- o Develop and implement a division attrition management plan.
- o Monitor and improve the division morale programs.
- o Develop new ideas to improve division/community relations.
- o Serve as the Commanding General's representative on the Enlisted Advisory Council.

c. LIST YOUR SIGNIFICANT CONTRIBUTIONS

Established procedures to reduce the processing of paperwork required throughout the division by 20%. Worked with the State Recruiting Retention Manager to provide the division more full-time recruiting support. Improved officer procurement by establishing and assigning responsible officers for each of the various officer accession programs, such as OCS and ROTC. Developed and conducted a division Personnel Officers Conference which will continue to meet quarterly. Improved coordination in the personnel area between the division and State HQ. Established a division Enlisted Advisory Council. Obtained CG's approval on the division/community relations program.

Harold C. Gray 15 Sep 80

(Signature and Date)

Users of this pamphlet are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) to NGB-ARP-O, Washington, DC 20310.

LA VERN E. WEBER, Lieutenant General, USA
Chief, National Guard Bureau

OFFICIAL:

ROBERT H. NEITZ, Colonel, USAF
Executive, National Guard Bureau

DISTRIBUTION:

A, plus 1 ea ARNG officer