



UNITED STATES MARINE CORPS
3D MARINE REGIMENT (REIN)
3D MARINE DIVISION (-) (REIN)
BOX 63004
MCBH KANEOHE BAY, HI 96863-3004

IN REPLY REFER TO:
RegtO 1500.1
CO
2 SEP 2014

REGIMENTAL ORDER 1500.1

From: Commanding Officer
To: Distribution List

Subj: MARINE CORPS LEADERSHIP DEVELOPMENT (MCLD) IN 3D MARINE REGIMENT

Ref: (a) Marine Corps Leadership Development Website:
<https://www.mcu.usmc.mil/sites/leadership>
(b) MCWP 6-11, Leading Marines
(c) NAVMC 2795, USMC User's Guide to Counseling
(d) MCO 1500.XX Marine Corps Leadership Development (Draft)
(e) MCO 1553.4B, Professional Military Education
(f) SECNAVINST 1740.4 Professional Financial Management Program
(g) MARADMIN 162/10, Safeguarding Personally Identifiable Information
(h) TECOM's MOS Roadmaps
(i) MCO P1610.7F, Performance Evaluation System
(j) MCRP 6-11B, Marine Corps Values: A Leader's Guide for Discussions
(k) RegtO 1320.1E, Personnel Sponsorship

Encl: (1) Functional Area Resources for the "6 F's"
(2) Minimum Coaching/Counseling Guidelines
(3) Initial Coaching/Counseling Form
(4) Second/Subsequent Coaching Form (Marine/Sailor)
(5) Second/Subsequent Counseling Form (Leader)
(6) Example Command Leadership Development Coordinator Appointment Letter

1. Situation

a. Background. Since its inception, our Corps has unfailingly emphasized the development of competent, honorable, courageous and committed leaders. Yet, we have largely done so informally, passing lessons learned from one generation of Marine and Sailor to the next verbally and, since the 1980s, without the benefit of formal institutional guidance.

b. Overview. Marine Corps Leadership Development (MCLD) is a relatively new service-level initiative which aims to codify and organize many of the best practices already in daily use throughout our Corps and certainly within 3d Marine Regiment. Recognizing that warfighting is a uniquely human endeavor, MCLD focuses on strengthening the bonds between people through active counseling, mentoring, and coaching. When implemented properly, MCLD enhances mutual respect and trust between a leader and those he leads. MCLD aims to focus, codify, improve, and expand upon the informal way in which we currently pass leadership teachings and lessons. At its core, MCLD is not another program that seeks to put "rocks in the pack" of Marine leaders. In fact, it is not a "program" at all. Rather, MCLD is a way of thinking about the people-focused nature of leadership and warfighting. Once formally instituted across the service, MCLD will replace and cancel the Marine Corps Mentorship Program.

DISTRIBUTION STATEMENT A: Approved for public release; distribution unlimited.

2. Mission. Effective immediately, 3d Marine Regiment institutes and sustains Marine Corps Leadership Development in order to deliberately facilitate, improve and monitor the personal and professional growth of our Marines and Sailors, hone leadership skills, enhance trust, and improve unit cohesion, thereby increasing combat readiness.

3. Execution

a. Commander's Intent

(1) Purpose. The objective of the regiment's MCLD effort is to incorporate and schedule leadership training, education, and regularly recurring coaching and counseling into our weekly battle rhythms to enhance the leadership proficiency and personal development of all Marines and Sailors.

(2) Method

(a) MCLD strengthens the relationship between the leader and the led. Ultimately, it "connects" Marines and Sailors to one another - officer to officer; enlisted to enlisted; officer to enlisted; and enlisted to officer. When effectively executed, MCLD is a *continuous* human development-focused effort which will permeate through each and every level of our command. **It exists to drive the personal and professional development of all of our Marines and Sailors through structured, scheduled, focused, and regularly recurring counselings and other "kneecap-to-kneecap" activities.** It demands fully engaged, positive leadership as a matter of routine and capitalizes on the multitude of positive outcomes created by an unwavering commitment to developing our fellow Marines and Sailors.

(b) MCLD will fail without our commitment to its success. Consequently, understanding and "buy-in" at all levels are critical. There are no negative effects associated with this effort. MCLD will enhance both individual and collective competencies across 3d Marine Regiment, bolster the leadership and warfighting effectiveness of our people, and positively influence our command climate and collective commitment to excellence.

(3) Endstate. Ultimately, tireless commitment to this effort by each and every person in our command will achieve MCLD's primary focuses: **making our officers and enlisted Marines & Sailors better leaders, enhancing individual and collective proficiency and decision-making, and creating future leaders who are fully prepared to assume positions of increased responsibility.**

b. Concept of Operations

(1) In accordance with this order and its references, subordinate commanders will implement MCLD within their organizations and ensure that sufficient time for counseling and leadership development is allocated within unit training schedules and plans.

(2) Counseling and leadership development efforts as part of this order will be documented on battalion and below training schedules.

(3) All leaders within 3d Marines shall develop counseling records for each of their assigned Marines and Sailors.

(4) In implementing MCLD, 3d Marines will adopt the Corps' newly

published six functional areas of leadership development and use them to focus our counseling and individual development efforts. Commonly known as the "6 F's," these functional areas ensure a comprehensive approach to leader development and are applicable to all Marines and Sailors, regardless of rank. Pursuing balanced excellence in these areas is critical to developing a "whole Marine" or "whole Sailor" who is honorable, courageous, competent, and committed. Throughout history, these attributes have consistently proven to be the bedrock of the world's most effective and respected warfighting organizations.

(a) Fidelity - A Marine or Sailor's adherence to core values and belief in his unit.

(b) Fighter - A Marine or Sailor's warfighting and Military Occupational Specialty (MOS) skills.

(c) Fitness - A Marine or Sailor's physical, spiritual, and mental fitness.

(d) Family - A Marine or Sailor's relationship with whatever he calls his family (and regardless of marital status).

(d) Finances - A Marine or Sailor's financial health.

(e) Future - Achieving a Marine or Sailor's future goals, inside and outside the Corps.

While centered on these "6 F's," MCLD should not be viewed as simply another checklist-driven program or initiative. Rather, it must be embraced as a way of approaching the critical tasks that all Marine leaders share: to coach, counsel, mentor, and inspire subordinates who are the future of our Corps. A full description of each functional area and learning resources associated with each are contained in reference (a) and enclosure (1).

c. Tasks

(1) Commanding Officer

(a) In accordance with this order, counsel subordinate battalion and company commanders, the Operations Officer, the Executive Officer, and the Regimental Sergeant Major.

(b) Utilize Command Climate Surveys to analyze MCLD trends within the unit.

(2) Executive Officer

(a) In accordance with this order, provide oversight, guidance, and staff coordination in support of regimental leadership development efforts. Focus the Regimental Surgeon, Operational Stress Control and Readiness Team, Family Readiness Officer, and Career Retention Specialist to support leadership development efforts across the command.

(b) In accordance with this order, counsel all primary and special staff members, except the Operations Officer.

(c) Coordinate with installation subject matter experts to support leadership development training events.

(d) In accordance with enclosure (6), prepare Command Leadership Development Coordinator appointment letters for the Commanding Officer's signature.

(e) Ensure that Command Leadership Development Coordinators requiring qualifications or certifications are properly trained and accredited.

(f) No less than semi-annually, collect and consolidate subordinate unit feedback on MCLD implementation within this command.

(3) Operations Officer. Ensure that all training plans and schedules within the regiment allocate sufficient time for counseling and leader development.

(4) Sergeant Major

(a) Review the assignment of senior enlisted Marines and Sailors to serve as appropriate subject matter experts in support of the MCLDP.

(b) Maintain all relevant MCLD documents, forms, templates, orders, and references in order to meet training demands and Inspector General functional area checklist requirements.

(5) Battalion and Separate Company Commanders

(a) In accordance with this order, implement leadership development within your commands. Publish Battalion and separate Company leadership development orders no later than 1 September 2014.

(b) Allocate sufficient time for counseling and leader development on weekly training schedules.

(c) In accordance with enclosures (2) through (5), construct, standardize, and maintain individual coaching/counseling records for all Marines and Sailors in the unit.

(d) Ensure that all Marines and Sailors receive a leadership development-focused orientation as part of unit check-in/welcome aboard process.

(e) Identify and assign Command Leadership Development Coordinators to serve as advisors and instructors for leadership development training.

d. Coordinating Instructions

(1) Initial Counseling. All Marines and Sailors reporting to 3d Marines, changing duties, or experiencing a change in Reporting Senior will be counseled by their assigned immediate leader within ten days of that occurrence. This counseling will be conducted in accordance with reference (a) and enclosures (2) and (3) to this order. In accordance with reference (h), Reporting Seniors will also jointly establish billet descriptions with sergeants and above within this initial ten day period.

(2) Subsequent Counseling. Following initial counseling, Marines and Sailors will be counseled in accordance with reference (c) and enclosures (4) and (5) of this order. Marines and Sailors in pay grades E-1 through E-3

will receive a second and subsequent counseling every 30 days. Marines and Sailors in pay grades E-4 and above, including officers, will receive a counseling every 90 days. Immediate supervisors may counsel their subordinates or specific billet holders more frequently, if warranted. Additionally, if a Lance Corporal is filling a Team Leader's billet, then he will be counseled as a Corporal by his Squad Leader.

(3) Maintaining and Safeguarding Counseling Records

(a) In accordance with enclosures (2) through (5), counseling records shall be maintained in either electronic medium or as hard copies within in unit spaces. Counseling records are subject to review at all meritorious promotion boards, Marine/Noncommissioned Officer of the Quarter/Year Boards, non-judicial punishment proceedings, or on request from competent authority. Records are to be kept up to date, organized, and legible. Immediate leaders and the Marine or Sailor receiving counseling feedback will sign the counseling form. Only performance-based counselings may be used during promotion, meritorious, or legal and adverse proceedings. All personal, confidential portions of counseling sessions are not to be included in any proceeding outside of counseling.

(b) In accordance with reference (g), these records will be safeguarded and protected from theft and inappropriate use. Each record shall contain a Privacy Act statement. The record shall be maintained by a Marine or Sailor's immediate leader and given to the individual Marine or Sailor upon transfer or end of active service. The record shall not transfer to the Marine's or Sailor's new unit or command. The record shall not transfer to the Marine's new unit or command. However, there may be information contained in the record of which the gaining command should be made aware. Specifically, any information which warrants a unit member to be considered/assigned to the Force Preservation Council, or makes the Marine one of the unit's top performers, likely warrants commander to commander notification to the gaining command.

(4) Mentoring. Although MCLD's adoption will supersede and cancel the Marine Corps Mentorship Program, the importance of mentorship cannot be discounted. Marines and Sailors are encouraged to seek out leaders - inside or outside of the chain of command - who they respect and emulate in order to receive mentorship and counsel.

(5) Professional Military Education (PME) and Self-Development. While unit leaders are specifically charged with developing their subordinates, it is important to note that individual Marines and Sailors have the most critical responsibility in their own development. *Marines and Sailors of all ranks must actually want to improve*. As such, they should seek out opportunities for professional growth. Off-duty education and professional reading are critical components of leadership development.

(6) Marine Corps Martial Arts Program (MCMAP). MCMAP serves as an excellent mechanism to develop Marines and Sailors physically, emotionally, and ethically. Martial Arts Instructors within the 3d Marine Regiment will incorporate character discussions into all MCMAP training programs and use these discussions to expand upon the "6 F's."

e. Risk Management. Nearly one-third of all Marines and Sailors begin their initial enlistment, complete active service, or transfer between units each year. This high rate of personnel turnover is particularly challenging within the 3d Marine Regiment, given our regiment's unique positioning in the

middle of the Pacific Ocean and the enduring pace of both operational deployments and training exercises. Recognizing these factors, 3d Marine Regiment will leverage MCLD's tenants to focus on those times within a unit's life cycle where risk is high and on individuals who may pose undue risk to themselves, others, or to the mission. Leaders at all levels should focus their counseling efforts on the following events and timeframes:

(1) Sponsorship, Reception, and Integration (Sustaining the Transformation). The 3d Marine Regiment is a crisis response force, prepared to deploy and fight anywhere, at any time. Consequently, assimilating Marines and Sailors into units professionally, deliberately, and quickly is a fundamental responsibility of all leaders. Leaders will use references (i) and (k) and this order to help assimilate Marines and Sailors into their respective units.

(2) Pre and Post-Deployment. The weeks leading up to an operational deployment present significant risk to Marines, Sailors, and their families. Leaders should ensure pre-deployment counselings focus on the Marines' and Sailors' families and finances during this critical time. Likewise, the days and weeks leading up to the return of a Marine or Sailor from deployment may present challenges and emotional strife. During this time, unit leaders will focus their counselings to prepare individuals for return, reunion, and reintegration at home station. Battalion and regimental programs are available to help.

(3) Pre-Separation Counseling. Leaders will aim to ensure that separating Marines and Sailors attend Transition Readiness Seminars one year prior to separation and no less than six months before end of active service or retirement. Moreover, leaders shall formally recognize the service of all those who honorably depart active service within 3d Marine Regiment.


(4) At-Risk Marines and Sailors. Significant life events such as births, deaths, marriages, divorces, judicial/non-judicial/administrative actions, pending separations, and promotions into positions of increased responsibility all present challenges to individual Marines and Sailors. Leaders must recognize these events and tailor counselings to aid Marines and Sailors in coping with their unique demands.

4. Administration and Logistics. Omitted.

5. Command and Signal

a. Applicability. This order applies to all Marines and Sailors assigned to 3d Marine Regiment, regardless of location or deployment status.

b. Signal. This order is effective the date signed.


W. E. WINAND

Distribution: A

FUNCTIONAL AREA RESOURCES

FIDELITY	
Definition/Aim: Faithfulness to obligations, duties, or observances.	
Task to Leaders: Reinforce Marine Corps core values in order to (IOT) build unit cohesion, camaraderie, and esprit de corps. Focus on: Marine Corps and Unit Heritage, Core Values, and Marine Corps Leadership Traits and Principles.	
Functional Area Task	Resource
1. Review the Leadership Development Program (LDP) Fidelity Discussion Guide IOT better prepare for mentoring and counseling sessions.	The Fidelity Discussion Guide is located on the LDP website: https://www.mcu.usmc.mil/sites/leadership
2. Facilitate period of instruction for unit cohesion, camaraderie, and esprit de corps IOT reinforce Marine Corps and Unit Heritage, Core Values, and Marine Corps Leadership Traits and Principles.	A) Marine Corps History Traditions Power Point, available on MCLDP website. B) The Marine Corps History Division Historical Reference Branch contains a wealth of on-line information, Marines and Sailors can conduct historical research on specific units, battle histories, and on command chronologies. Marine Corps Customs and Traditions: https://www.mcu.usmc.mil/historydivision/Pages/CustomsTraditions.aspx Frequently Requested Marine Corps Historical Information: https://www.mcu.usmc.mil/historydivision/Pages/FrequentlyRequested.aspx Marine Corps Historical Program: https://www.mcu.usmc.mil/historydivision/Documents/MCO%205750.1H.pdf Historical Publications: https://www.mcu.usmc.mil/historydivision/Pages/Staff/Publications.aspx
3. Read and discuss Marine Corps Publication 6-11 D "Sustaining the Transformation" IOT absorb the foundational perspectives of maintaining the motivation and zeal first ingrained at entry-level training.	https://www.doctrine.usmc.mil/signpubs/r611d.pdf A must read for anyone interested in developing their subordinates and sponsoring, receiving and welcoming new Marines and Sailors to a unit.
4. Regularly integrate Warrior Case Studies to present a class and facilitate discussion IOT reinforce Marine Corps values and develop esprit de Corps.	https://www.trngcmd.usmc.mil/TBS/MACE/Pages/WarriorStudies.aspx Warrior Case Studies on the Marine Corps Martial Arts Program (MCMAP) website. The specific lessons are password protected. MCMAP instructors are able to provide these lessons as they are integrated with MCMAP training.
5. Conduct regular Ethical Decision Games and discussion groups IOT to develop ethical leaders of all ranks.	Issues of Garrison Ethics and Leadership: https://www.mcu.usmc.mil/Lleadership/LLI%20Site%20Documents/Doc%20Ethics/Ethics%20Branch/Publications/Is

FUNCTIONAL AREA RESOURCES

	<p>sues%20of%20Garrison%20Ethics%20and%20Leadership.pdf</p> <p>Small Unit Leaders Guide: Issues of Garrison Ethics and Leadership provides twenty-two different short vignettes on various issues of garrison ethics. The guide includes discussion guides. No Link for above</p> <p>Issues of Battlefield Ethics and Leadership. The Small Unit Guide for Issues of Battlefield Ethics and Leadership provides 17 vignettes along with discussion and question guides for each. This resource facilitates small unit leaders in the guidance of discussions on relevant issues surrounding ethics in battle.</p> <p>https://www.mcu.usmc.mil/Lleadership/LLI%20Site%20Documents/Doc%20Ethics/Ethics%20Branch/Publications/Issues%20of%20Battlefield%20Ethics%20and%20Leadership.pdf</p> <p>Leadership Ethics Law of War Discussion Guide:</p> <p>https://www.mcu.usmc.mil/Lleadership/LLI%20Site%20Documents/Doc%20Ethics/Ethics%20Branch/Publications/Leadership%20Ethics%20LOW%20Discussion%20Guide%20Minus%20Hadith%202008.pdf</p> <p>The Small Unit Guide for Law of War contains 16 case studies from Vietnam, Iraq, and Afghanistan, each of which is approximately 15 pages in length. No Link for above</p>
--	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

FUNCTIONAL AREA RESOURCES

FIGHTER

Definition/Aim: A Marine or Sailor's ability and readiness to engage in his primary MOS while in combat.

Task to Leaders: Advance the warfighting skills of Marines and Sailors. Pay particular attention to ethical decision making, MOS proficiency, and combat readiness by focusing on the following areas: Marine Corps Common Skills, Military Occupational Specialty (MOS) proficiency, Professional Military Education (PME), weapons employment, patrolling, and tactical communications.

Functional Area Task	Resource
1. Training and Education Command's (TECOM) MOS Roadmaps	Units leaders should access TECOM's MOS roadmaps on MarineNet: https://www.marinenet.usmc.mil/MarineNet/Courses/Catalog.aspx?select=4889509c-73cc-453d-96e8-261498e16aeb
2. Applicable Training & Readiness (T&R) Manual	All MOS T&R Manuals are posted to TECOM's website. Note: The Marine Corps Common Skills T&R Manual contains tasks applicable to all Marines and Sailors.
3. Integrate MarineNet and Marine Corps Institute MOS-related skills classes into training IOT reinforce proficiency.	MarineNet: https://www.marinenet.usmc.mil/MarineNet/Courses/Catalog.aspx?select=4889509c-73cc-453d-96e8-261498e16aeb
4. Conduct small group, rank specific PME sessions discussing relevant books on the Commandants Professional Reading List IOT promote culture of reading, learning, and discussing warfighting, and leadership in the command.	http://guides.grc.usmcu.edu/usmcreadinglist This website has the Commandants updated reading list from 2 January 2013.
5. Facilitate rank-specific PME discussions on relevant issues IOT promote intellectual growth and tactical learning.	http://guides.grc.usmcu.edu/content.php?pid=312696&sid=2566666 The Unit PME website has rank specific tabs each including short lessons on a particularly rank relevant issue. The issues are closely coordinated with resident PME so in addition to developing an individual Marine's and Sailors knowledge, Marines and Sailors are also better prepared to fulfill PME requirements.

FUNCTIONAL AREA RESOURCES

FITNESS	
<p>Definition/Aim: Encompasses a Marine or Sailor's mental, physical, emotional and spiritual state of being.</p> <p>Task to Leaders: Develop resilient, tough, and healthy Marines by promoting positive choices.</p>	
Functional Area Task	Resource
1. Annual SemperFit Training.	<p>MarineNet:</p> <p>https://www.marinenet.usmc.mil/MarineNet/Courses/Catalog.aspx?select=4889509c-73cc-453d-96e8-261498e16aeb</p> <p>Under the Military training tab, select annual training (MarineNet ANNUALTR 13). This annual training conducted on Marine Net includes the complete Semper Fit series to include: Alcohol and Drug Recognition, Sexual Health, Tobacco Cessation, Nutrition, Fitness, Injury Prevention, and Hypertension/High Cholesterol.</p>
2. Integrate behavioral health based classes into annual training IOT strengthen, maintain, and promote individual readiness.	<p>http://bhin.usmc-mccs.org/</p> <p>The Behavioral Health website is the home of resources that are all downloadable or can be ordered. It focuses on five key issues of behavioral health in the Marine Corps: Combat and Operational Stress, Suicide Prevention, Substance Abuse, Family Advocacy, and Sexual Assault Prevention and Response.</p>
3. Suicide Awareness and Prevention Training.	<p>MarineNet Course: MFCSPPO01</p> <p>Suicide Prevention Program Officer training provides an overview of the Marine Corps Suicide Prevention and Response Program.</p>
4. Execute weekly MCMAP training IOT gain greatest benefits from the program. Ensure spiritual and ethical portions of MCMAP are fully utilized.	<p>MACE:</p> <p>https://www.trngcmd.usmc.mil/TBS/MACE/Pages/Instructor-Resources.aspx</p> <p>Martial Arts Center of Excellence (MACE): The MACE website offers training materials for unit MCMAP instructors.</p>
5. Execute comprehensive physical fitness program IOT enhance physical readiness. Foundational training in High Intensity Tactical Training (HITT) for all Marines is encouraged and will be conducted as resources and time allow.	<p>USMC Physical Fitness Readiness Guide: https://fitness.usmc.mil/Pages/home.aspx</p> <p>HITT Training Program: https://fitness.usmc.mil/Pages/HITTAcademy.aspx</p> <p>HITT Program Booklet: http://www.mccsmiramar.com/pdfs/HITT-METHODOLOGY.pdf</p>

FUNCTIONAL AREA RESOURCES

FAMILY	
<p>Definition/Aim: Families are critically important to the health, well-being, and readiness of Marines and Sailors. Marines and Sailors who do not have strong family connections risk being preoccupied in combat. This functional area applies to all Marines and Sailors, not just those that are married.</p> <p>Task to Leaders: Develop Marines and Sailors who understand the importance of strong family relationships and how to cope with the stressors of military life. Focus on family readiness, marriage prep, healthy relationships, and parenting skills.</p>	
Functional Area Task	Resource
1. Integrate discussions on family responsibility into small unit and individual counseling.	<p>The family discussion guide is a baseline introduction of how leaders can begin discussions on family issues.</p> <p>https://www.mcu.usmc.mil/sites/leadership</p>
2. Marine Corps Base Hawaii (MCBH) specific family resources.	<p>http://www.mccshawaii.com</p> <p>MCCS Hawaii's Marine and Family Programs division maintains a good website with links to all of the programs offered at MCBH.</p>
3. Integrate education on Marine Corps and Department of Defense (DoD) Programs into annual training, counseling sessions, and new-join briefs.	<p>http://www.militaryonesource.mil/</p> <p>https://www.manpower.usmc.mil/portal/page/portal/M_RA_HOME/MF</p> <p>http://www.usmc-mccs.org/</p> <p>There are no specific resources that are all encompassing on support programs. However, during unit training and individual counseling, leaders may expose their Marines and Sailors to these resources.</p>
4. Conduct domestic abuse training.	<p>MarineNet Course: DD03DV</p> <p>This training is based on DoD policy and is intended to enhance abilities to implement an effective response to domestic violence.</p>

FUNCTIONAL AREA RESOURCES

FINANCES	
<p>Definition/Aim: A solid understanding of a Marine or Sailor's personal financial situation affords him a better chance of achieving financial success during their military career and throughout life.</p> <p>Task to Leaders: Develop Marines and Sailors who are informed about the imperatives of good spending and savings habits. Ensure each Marine or Sailor has the ability to effectively manage his own finances. Focus on budgeting skills, savings programs, and the pitfalls of carrying debt.</p>	
Functional Area Task	Resource
1. Financial Specialist Subject Matter Expert training.	<p>MCCS Website: http://www.usmc-mccs.org/LeadersGuide/Personal/Financial/generalinfo.cfm</p> <p>https://www.manpower.usmc.mil/portal/page/portal/M_RA_HOME/MF/D_Personal%20and%20Professional%20Development/C_PFMP</p> <p>The Marine Corps Personal Financial Management Program (PFMP) provides personal financial education, training, coaching, and referral services to the Marine/Sailor and his family.</p>
2. Provide financial literacy awareness training.	<p>Military Pay, Allowances, and Benefits (PFMP PowerPoint Presentation, simplified).</p> <p>Financial Planning for Family Separation and Reunion (PFMP PowerPoint Presentation, simplified).</p> <p>Banking and Financial Services (PFMP PowerPoint Presentation, simplified)</p> <p>Savings and Investing, Basic (PFMP PowerPoint Presentation, simplified).</p> <p>Credit and Debt Management (PFMP PowerPoint Presentation, simplified)</p> <p>Car Buying (PFMP PowerPoint Presentation, simplified).</p> <p>The resources on critical areas of financial literacy are adapted from MCCS PFMP with speaker notes and associated financial readiness forms are available on the MCLDP website: https://www.mcu.usmc.mil/sites/leadership</p>
3. Integrate discussions on financial responsibility into small unit and individual counseling sessions IOT improve financial readiness.	<p>Financial Discussion Guide: https://www.mcu.usmc.mil/sites/leadership</p> <p>Covers the foundational aspects of financial awareness: Military Pay, Car Buying, Personal Finance, Identity Theft, and Consumer Awareness.</p>

FUNCTIONAL AREA RESOURCES

FUTURE	
Definition/Aim: Facilitate Marine and Sailor decision-making about their futures, inside the service or out.	
Task to Leaders: Ensure that Marines and Sailors are educated on the benefits that their service has afforded them. Assist with transition out of the service, re-enlistment, or transfer. Focus on the following: goal setting, educational opportunities, Veterans Affairs (VA) benefits, time management, and planning for the future.	
Functional Area Task	Resource
1. Ensure that all separating Marines and Sailors attend Transition Readiness Seminars.	Schedule through 1stSgts and Career Planners, Marines and Sailors should attend one year prior to separation, but no less than 180 days prior.
2. Obtain Sailor/Marine American Council on Education Registry Transcript (SMART) which depict which military courses a Marine or Sailor has attended and what college credit he might earn for those courses.	See Navy/Marine Corps SMART website.
3. Ensure all transitioning/career Marines and Sailors receive proper career counseling and advice IOT make well-informed decisions.	Resource: Unit Leaders, Mentors, and Unit Career Planners.
4. Review VA Benefits.	See VA website.
5. Network for civilian employment.	Various websites allow veterans and separating active-duty personnel to post resumes and seek employment assistance. Military OneSource and the Marine Executive Association are two of the most commonly used.

MINIMUM COACHING/COUNSELING REQUIREMENTS

Grade/Frequency	Initial Counseling	Subsequent Counseling
E-1 to E-3	Within 10 days of joining and/or establishing new leader-subordinate relationship	Every 30 days
E-4 to O-5	Within 10 days of joining or establishing a new leader-subordinate relationship	Every 90 days

Notes:

1) For those Marines receiving a fitness report, in accordance with Marine Corps Order P1610.7F W/CH1-2, paragraph 4004.2.c (Marine Corps Performance Evaluation System (PES) the Reporting Senior and the Marine Reported On shall establish and formalize the MRO's billet description during this first session. Sailors evaluations should also be discussed.

2) Coaching/counseling may occur more frequently, if necessary. This is especially true of Marines and Sailors in the following situations:

- a) At-risk Marines and Sailors.
- b) Those Marines or Sailors who have recently completed a lateral move from another Military Occupational Specialty/Rate.
- c) Marines or Sailors recently promoted or assigned to new, more complex duties.

PRE-COUNSELING TIPS

Leader	Marine / Sailor Being Counseled
Pick a suitable venue which should be quiet, professional, and yet relaxed.	Arrive on time, with an open mind and in the proper uniform.
Come prepared. Write out what you want to say. Prepare the forms ahead of time. Do not wing it.	Take notes and listen.
Provide honest and substantive feedback. Be friendly, but sincere and firm. You are a leader, not a buddy.	Offer comments where appropriate.
Follow-up. If agreements are made during the session, follow-up on them promptly.	Ask about how you can improve.
Schedule the next counseling session. Give the Marine or Sailor being counseled specific goals to reach before the next session.	Be sincere and do not be defensive.

For additional tips, see NAVMC 2795, the USMC User's Guide to Counseling.

Initial Coaching/Counseling Form
Completed by the Leader

Date:

NAME (LAST, FIRST, MIDDLE INITIAL)	GRADE	UNIT / SECTION
GRADE & NAME OF LEADER		

Introduction/Welcome Aboard:

Unit Mission:

Section Mission:

Marine's or Sailor's critical role in support of the unit mission:

Billet Description/Responsibilities:

LEADER'S SIGNATURE: _____

MARINE/SAILOR BEING COUNSELED SIGNATURE: _____

Next Steps:

- Leader: Make a copy of completed Initial Coaching/Counseling Form and provide to the Marine or Sailor. In addition, provide a blank copy of Second/Subsequent Coaching Form, explain its purpose and arrange for the second or subsequent session (respectively).
- Marine or Sailor: Review First Initial Coaching/Coaching Form (Billet Description/Responsibilities in particular) prior to second/subsequent session. Complete Second/Subsequent Coaching Form prior to the second session and be prepared to discuss personal and professional goals.

Instructions for completing the
Initial Coaching/Counseling Form

The purpose of the Initial Coaching/Counseling Form is to establish rapport between the leader and Marine or Sailor and to set the conditions for their success in the unit. The leader will ask simple questions including those about where the Marine or Sailor came from and if he or she wishes to discuss any family/personal issues. Before the Initial session ends, the leader will set-up a second session and encourage the Marine or Sailor to think about personal/professional goals as outlined on the sample coaching form found on the MCLD website.

1. **Date:** Date of session.
2. **Name:** Name of the Marine or Sailor.
3. **Grade:** Grade of the Marine or Sailor.
4. **Unit/Section:** Unit/Section of the Marine or Sailor.
5. **Name/Grade of Leader:** Name and grade of the leader.
6. **Introduction/Welcome Aboard:** The leader establishes rapport by asking a few questions about the Marine's or Sailor's previous duty station, billet, and if there are any family/personal issues they wish to discuss. Additional information in preparing for a coaching/counseling session can be found in NAVMC 2795 (USMC User's Guide to Counseling) in the "Future" section of the MCLD website:
<https://www.mcu.usmc.mil/sites/leadership>
7. **Unit Mission:** Mission of Marine's or Sailor's unit.
8. **Section Mission:** Mission of Marine's or Sailor's section.
9. **Marine's/Sailor's critical role in support of the unit's mission:** In specific terms, the role of the Marine or Sailor in support of the unit's mission.
10. **Billet Description/Responsibilities:** For E-5 and above, reference (j) requires the Reporting Senior (RS) and Marine Reported On (MRO) to establish and formalize the MRO's billet description within 15-days of establishing the reporting relationship. The MCLD Order requires the leader to establish a billet description and responsibilities for E-4 and below during the first session as well.
11. **Next Steps:** Sets-up the second session by reviewing Second/Subsequent Coaching and Counseling Forms along with scheduling.

Second/Subsequent Coaching Form
 Completed by the Marine or Sailor

Date:

Reason for coaching (circle one): Second / subsequent

NAME (LAST, FIRST, MIDDLE INITIAL)	GRADE	UNIT / SECTION
GRADE & NAME OF LEADER		

Goals: (Specific, Measurable, Attainable, Realistic, Time-based)

<u>Functional Area & Goals</u>	<u>Action Steps to Achieve Goals & Goal Status</u>	<u>Deadline</u>
<u>Fidelity:</u>		
<u>Fighter:</u>		
<u>Fitness:</u>		
<u>Family:</u>		
<u>Finances:</u>		
<u>Future:</u>		

LEADER'S SIGNATURE: _____

MARINE/SAILOR BEING COUNSELED SIGNATURE: _____

Instructions for completing the
Second/Subsequent Coaching Form

The purpose of the second/subsequent coaching session is to help a Marine or Sailor to establish goals and provide feedback on an informal basis. Coaching can be related to job performance and professional development, but is not restricted to these areas. Progress or lack of progress of the goals outlined on the coaching form shall not be a part of the Marine's or Sailor's performance evaluation except in very rare circumstances. The individual Marine or Sailor completes the coaching form. To be most effective, goals must be SMART (Specific, Measurable, Attainable, Realistic, Time-based).

1. **Date:** Date of session.
2. **Reason for coaching:** Reason for the session indicating whether second or subsequent.
3. **Name:** Name of the Marine or Sailor.
4. **Grade:** Grade of the Marine or Sailor.
5. **Unit/Section:** Unit/Section of the Marine or Sailor.
6. **Grade/Name of Leader:** Grade and name of the leader.
7. **Goals**
 - **Functional Area and Goals:** Marine or Sailor fills in specific goals for each of the six functional areas.
 - **Action steps:** Marine or Sailor lists steps to be taken IOT achieve his or her goals; status of goals (including those from previous sessions) should be reviewed.
 - **Deadline:** Marine or Sailor lists a deadline to achieve action steps.

Additional information in preparing for a coaching/counseling session can be found in NAVMC 2795 (USMC User's Guide to Counseling) in the "Future" section of the MCLD website: <https://www.mcu.usmc.mil/sites/leadership>

Second/Subsequent Counseling Form
Completed by the Leader

Date:

Reason for counseling (circle one): Second / subsequent

NAME (LAST, FIRST, MIDDLE INITIAL)	GRADE	UNIT / SECTION
GRADE & NAME OF LEADER		

Billet Description/Responsibilities:

Billet Accomplishments:

Plan of action / Suggested resources:

Comments by Marine/Sailor:

LEADER'S SIGNATURE: _____

MARINE/SAILOR BEING COUNSELED SIGNATURE: _____

Instructions for completing the
Second/Subsequent Counseling Form

The purpose of the second/subsequent counseling session is to formalize or review a billet description, document billet accomplishments, and ensure the Marine or Sailor is on-track for success. The leader completes the counseling form.

1. **Date:** Date of session.
2. **Reason for counseling:** Reason for the session indicating whether second or subsequent.
 - a. The leader should take a few minutes to review NAVMC 2795 (USMC User's Guide to Counseling). Suggested areas to focus on within NAVMC 2795 are as follows:
 - Para 1001 gives the purpose of counseling and its importance on developing Marines.
 - Chapter 2 reviews the process, practices, and skill of counseling.
 - Chapter 3 reviews preparing for, opening, conducting, and closing the session along with following-up after the session has been completed.
 - Chapter 4 provides an in-depth review of counseling practices and skills required to conduct an effective counseling session to include setting targets, problem solving, questioning, active listening, giving feedback, and planning for improvement.
 - Chapter 5 identifies some of the most common problems that arise in the counseling process for both the senior and the junior.
 - Additional information in preparing for a coaching/counseling session can be found in NAVMC 2795 (USMC User's Guide to Counseling) in the "Future" section of the MCLD website:
<https://www.mcu.usmc.mil/sites/leadership>
3. **Name:** Name of the Marine or Sailor.
4. **Grade:** Grade of the Marine or Sailor.
5. **Unit/Section:** Unit/Section of the Marine or Sailor.
6. **Grade/Name of Leader:** Grade and name of the leader.
7. **Billet Description/Responsibilities:** Used to review/update billet description and responsibilities.
8. **Billet Accomplishments:** Used to document billet accomplishments.
9. **Plan of Action / Suggested Resources:** A plan of action and suggested resources for the Marine or Sailor. To be most effective, goals must be SMART (Specific, Measurable, Attainable, Relevant, and Time-based).
10. **Comments by Marine/Sailor:** Comments by the individual Marine or Sailor.

From: Commanding Officer
To: Said Name Marine or Sailor

Subj: APPOINTMENT AS COMMAND LEADERSHIP DEVELOPMENT COORDINATOR

Ref: (a) Bn/RegtO 1500.XX

1. You are hereby appointed as this Command's Leadership Development Coordinator. This critically important assignment carries your duties in support of the Command Leadership Development Program (LDP) shall include, but are not limited to the following:

(a) Maintain all relevant Marine Corps Leadership Development documents, forms, templates, orders, and references on hand in support of Command LDP training events and the Inspector General functional area checklist.

(b) Assist in the review, drafting, editing, assembly, and publication of printed materials and standardized counseling jackets.

(c) Provide oversight of all LDP training efforts.

(d) Coordinate with base, Group/Regimental, and subordinate unit Subject Matter Experts (SME) to support LDP planned training events.

(e) Ensure Group/Regimental SMEs are appointed in writing by the commanding officer as appropriate.

(f) Ensure Group/Regimental SMEs who require qualifications or certifications are properly trained and accredited.

2. The Regimental (or Battalion) Executive Officer and Sergeant Major are available to assist you and provide you their guidance and expertise. Likewise, I am available to do the same.

I. M. COMMANDER

Enclosure (6)