***First* 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:***

***Next Steps:***

* Leader: Make a copy of completed First 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 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

*First* Coaching/Counseling form

The purpose of the *First* 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 *First* 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](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.