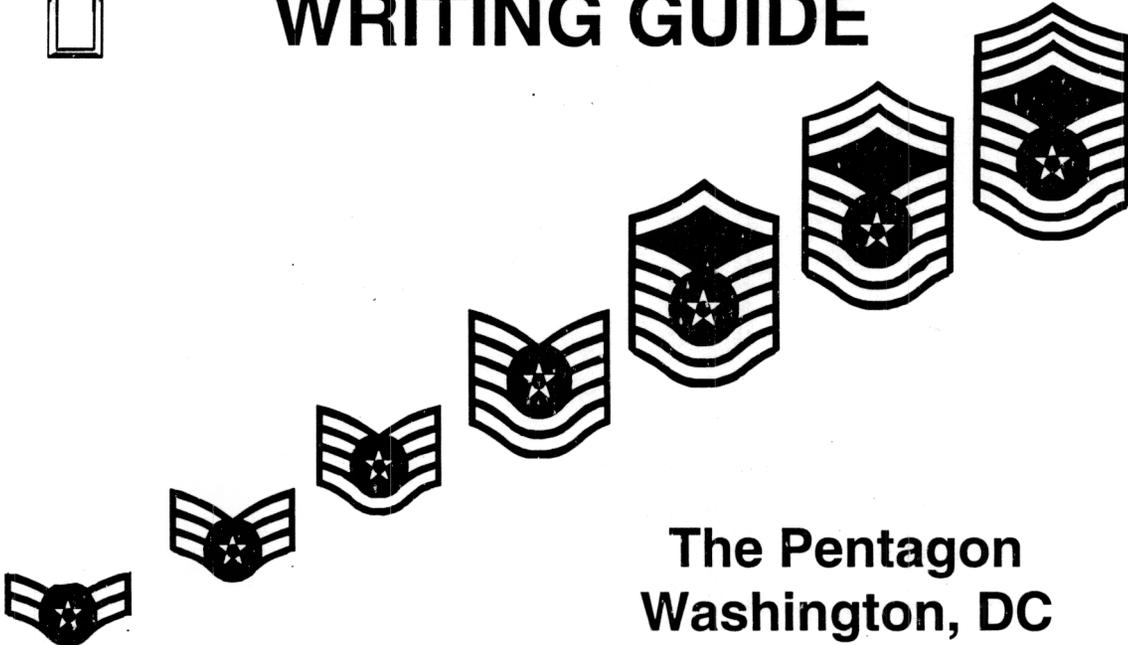# SECRETARY
## of the
# AIR FORCE

# EPR/OPR/PRF
# WRITING GUIDE

**The Pentagon
Washington, DC**

**January 2001**

# ACKNOWLEDGEMENTS

SAF/AAP gratefully acknowledges everyone who helped put this product together. Folks from all over the Secretariat staff contributed immeasurably with comments, suggestions, and examples.

Excellent examples and suggestions are also included from "How to Write a Killer Bullet;" a course by CMSgt Herbert C. Rhay, Jr.

The Hill AFB Writing Guide, March 1999, was also used to provide formatting and background material.

# REFERENCES

AFI 36-2406, Officer and Enlisted Evaluation Systems, 1 July 2000

AFH 33-337, The Tongue and Quill, 30 June 1997

"How to Write a Killer Bullet;" Rhay, Herbert, Jr. CMSgt, USAF

# DISCLAIMER

This is a local, unofficial training guide produced by SAF/AAP, intended for internal SAF use only. It is not intended to replace or supercede any Air Force Instruction or higher headquarters guidance. Every effort has been made to verify the accuracy of this information. In any case of disagreement, Air Force guidance takes precedence.

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# SECTION A

## QUICK REFERENCE

Use Section A as your Quick Reference Guide to answer the basic questions before you begin and as a Checklist Reference (see pp. 5 and 6) when proofreading your reports prior to submission. Please read the rest of the guide for greater detail.

## THE BASICS

- **Know when your troops require performance reports** -- Don't wait on the Report Shell to kick out -- it's your responsibility -- your orderly room should remind you, but ultimately, it's up to you as the supervisor to know when your troops' reports are due

- **Review the Report Shell THOROUGHLY** -- there's a ton of information in there

- **Review the ratee's previous performance reports** -- make sure you know the person you're rating!

- **Gather input from the ratee in advance**, but don't expect him/her to write the report for you -- keep notes throughout the rating period to refresh your memory when it's time to write

- **Take the time to familiarize yourself with AFI 36-2406** -- a large percentage of what we send back wouldn't have to be sent back if someone had just checked the AFI

- **Some statements are prohibited in performance reports** -- don't use them (see p. 7)

- **Use the correct AF Form** -- simple, yet surprisingly, often overlooked

| | |
|---|---|
| AB through TSgt | AF Form 910, dated 1 June 2000 Version 2 |
| MSgt through CMSgt | AF Form 911, dated 1 June 2000 Version 2 |
| 2Lt through Capt | AF Form 707B, dated 1 June 2000 Version 2 |
| Major through Colonel | AF Form 707A, dated 1 June 2000 Version 3 |

- **Take the time you need to write a quality report** -- MAKE THIS A PRIORITY!

- **Don't wait until the last minute** and never use the excuse, "I didn't get the Shell"

- **Write for impact** -- the performance report is a permanent record. make it count!

- **Know your unit's suspense date for the report**

- **PROOFREAD YOUR PRODUCT** -- take ownership for the report -- you wrote it; don't depend on someone else to make it right

- Submit the report per your organization's instructions so that it arrives in **final form to SAF/AAP NLT 10 days after the Closeout Date**

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## DO'S AND DON'TS

### Do
- Be honest on the report -- you owe it to the member and to the Air Force
- Use action-oriented, hard-hitting impact statements
- Get to the point -- don't beat around the bush
  Quantify results -- tell the world that the member saved $100K or cut cycle time 20%
  Fill up the entire form -- white space is a good way to send a bad message
- Stay within your scope -- don't make sweeping statements you can't personally verify
- Use bullet format in the appropriate blocks
- Spell out uncommon acronyms the first time you use them -- don't assume the world knows what a PIGA is (it's a Pendular Integrating Gyroscopic Accelerometer, but that's beside the point). It's ok to use common acronyms (see p. 4) without spelling them out first
- Abbreviate words like gov't for government in the interest of space where appropriate
- Be error free (no misspellings, no extra spaces, capital letters in right place...)

### Don't
- Use prohibited statements (see p. 7 for prohibited statements)
- Include additional duties unless focused toward the mission
- Use terminology only your organization understands
- Leave white space, unless, of course, you're trying to send a negative message
- Put your credibility on the line -- many notice when everyone is rated #1 -- the real #1 loses
- Use "all caps" for emphasis -- you can't say, "GREAT;" you have to say, "great"
- Use periods after bullets; it's just bad form
- Use more than one exclamation mark in a row at the end of a bullet: "!" is ok; "!!" is not
- Be rushed to print -- take the time to write a succinct, accurate, and honest report
- Use "fluffy" statements with no meat behind them

**Tone** It is very important to give readers a sense of how much you value the ratee's contributions. Enthusiastic narratives convince readers the ratee is a valued contributor. Mundane reports don't. However, consider carefully before you cross the line from enthusiastic to trite or cute. Consider these examples:

| | |
|---|---|
| "My #1 Action Officer" | No ambiguity. Short; to the point. Lets the board know exactly where the ratee stands. |
| "A walk-on-water kind of guy!" | This says nothing about the ratee's skills and may offend some people. |
| "Quality is her Job 1" | Advertising slogans should not creep into performance reports. Someday, the commercial will be forgotten and this will be gibberish. |

<u>**Word Choice**</u> Ensure you emphasize action and results. Use the past tense form of verbs when possible. Strong descriptive words leave a lasting impression with readers. Dull and monotonous accounts of what someone did give your reader the impression that the person you are talking about is average at best. Vivid verbs, adverbs and adjectives make your comments compelling. Mundane terms do not. Some examples (more found in Section E):

| <u>Vivid</u> | <u>Mundane</u> |
|---|---|
| Cut | Assisted |
| Created | Aided |
| Drove | Contributed |
| Guaranteed | Coordinated |
| Infused | Employed |
| Instituted | Maintained |
| Led | Monitored |
| Saved | Participated |
| Spearheaded | Reviewed |
| Developed | Adequate |
| Deftly | Capable |
| Diplomatically | Dependable |
| Dynamic | Effective |
| Energetic | Fine |
| Expertly | Potential |
| Rapidly | Ready |
| Persuasive | Sturdy |

<u>**Context**</u> Many readers will be unfamiliar with the types of duties performed in specific organizations and what duties people of different ranks normally perform. That makes it difficult for them to judge the significance of the ratee's accomplishments. Ensure your reader understands exactly what you mean, regardless of the reader's technical AF expertise. Give context when you can. For example:

"...only NCO on this influential product team"
"...first captain selected as branch chief in this directorate"

<u>**Stratification**</u> You owe it to board members to differentiate the leadership potential of your subordinates honestly and accurately. Board members need to be able to tell the difference between good, average, and poor performers during selection boards. Accurate descriptions of ratees' performance provide some natural differentiation, but a rater can help or hinder the board based on his or her choices of words. Make sure your ranking words are quantified and justified. Stratification examples:

**GOOD**
"Simply the best -- #1 of the 20 TSgts in my division"
"Best of 43 captains in my unit" or "top 1% of the 43 captains I supervise"

**BAD**
"within top 10% of all captains/NCOs" -- beyond the rater's scope -- see p. 7 for prohibited statements

**Common acronyms**  The following are examples of *some* common acronyms and do not need to be written out when used.  More obscure ones should be written out at first occurrence.  See page 26 for an expanded list.

| | | | |
|---|---|---|---|
| ACC | BTZ/BPZ | MAJCOM | SOS |
| ACSC | CC | MSM | SSS |
| AEF | CCAF | NAF | TDY |
| AF | CJCS | NATO | UAV |
| AFMC | CENTCOM | NCO | UCMJ |
| AFOSI | CFC | NCOA | UN |
| AFPC | CGO | NCOIC | JFCOM |
| AFI | CINC | OIC | USAF |
| AFR | COMSEC | Oplan | USAFE |
| AFRC | CONUS | OPSEC | USEUCOM |
| AFROTC | CY | ORE | USMILGP/MILGP |
| AFRES | DoD | ORI | USSOUTHAF/SOUTHAF |
| AFSOC | DUI | PACAF | USSOUTHCOM |
| AFSPACECOM | FY | PCS | USSPACECOM |
| ALS | HQ | PME | USSTRATCOM |
| AMC | IAW | POTUS | USTRANSCOM |
| ANG | IG | PRP | WRM |
| AOC | ISS | RC | |
| AOR | JCS | SNCO | |
| AWC | JTF | SNCOA | |

**Common Word Errors**  The words listed below are commonly misspelled or misused in OPRs/EPRs, decorations and award packages.  Please take the time to ensure your product is error free prior to submitting it for review/signature. **When in doubt, consult the most recent government dictionary available.**  These are just a few, and remember, the English language is constantly in flux.  These may change.  You'll always win an argument if your dictionary has the latest publishing date.  Hyphenate double-word adjectives before a noun, e.g., "base-wide" cleanup.

## COMMONLY MISSPELLED or MISUSED WORDS

| | |
|---|---|
| associate's degree | multinational |
| Associate's Degree in Management | noncommissioned |
| bachelor's degree | nonexistent |
| Bachelor's Degree in Management | reference |
| base wide or base-wide (depends on context) | semiannual |
| commissioned | short-notice (depends on context) |
| daily | spearheaded |
| database | topnotch |
| hand-picked | turn in, turn-in (depends on context) |
| man-hours | work center |
| master's degree | work force |
| Master's Degree in Management | work load |
| material (what a thing is made of, raw material) | worldwide |
| materiel (relating to weapons, equipment of arms) | Pentagon, Washington DC |
| ensure (to make sure) insure (insurance) | |

# SAF EPR CHECKLIST
## EPR - Section I. Ratee Identification Data

| Writer | Monitor | SAF | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Block 1-4 & 6-9: Match EPR Shell (block 7 see unit OPR/EPR monitor for proper title) |

## EPR - Section II. Job Description

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Block: 1: Matches EPR Shell |

## EPR - Section III. Evaluation of Performance

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Use computer to mark an X for each performance factor |

### Bottom of Form

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Correct form # (AF Form 910 AB-TSgt; AF Form 911-MSgt-CMSgt) |
| ❑ | ❑ | ❑ | Correct form version/date: (910-20000601 EF-V1; 911-20000601 EF V1) |

### Reverse Side

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Printed head to foot. Ratee's name appears in upper right corner |

## EPR - Section IV. Promotion Recommendation

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Use computer to mark an X for each performance factor |

## EPR - Section V. Rater's Comments

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Bullet statements; hyphen, space, first word capitalized; no bullet more than 3 lines; single-line bullets preferred; second line of bullet lines up under first word of first line; no internal punct within bullet other than dash, ellipsis, semicolon, colon, or comma; no periods; past tense |
| ❑ | ❑ | ❑ | Ensure feedback dates are included |
| ❑ | ❑ | ❑ | Rater name, duty title, and SSN match top of EPR Shell; rank is abbreviated |
| ❑ | ❑ | ❑ | Rater signature block is correct and organization has "(HAF)" after it (only ON commands) |
| ❑ | ❑ | ❑ | Date actually signed (must be on or after closeout date in block 7) |

## EPR - Section VI. Indorser's Comments (AF Form 910)

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Same as Section V |
| ❑ | ❑ | ❑ | Ensure "Concur" block is X'd before forwarding to MPF |
| ❑ | ❑ | ❑ | Check name, unit, duty title, and SSN: abbreviate the rank as shown in the Tongue and Quill |

## EPR - Section VI. Rater's Rater's Comments (AF Form 911)

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Same as Section V |
| ❑ | ❑ | ❑ | Ensure "Concur" block is X'd before forwarding to Indorser |
| ❑ | ❑ | ❑ | Check name, unit, duty title, and SSN: abbreviate the rank as shown in the Tongue and Quill |

## EPR - Section VII. Indorser

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Bullet statements; hyphen, first word capitalized; no bullet more than 3 lines; single-line bullets preferred; second line of bullet lines up under first word of first line; no internal punctuation within bullet other than dash, ellipsis, semicolon, colon, or comma; no periods; past tense |
| ❑ | ❑ | ❑ | If Rater's Rater is the final indorser, type in "This Section Not Used" and initial the unused signature block. Do not type in indorser's identification data already listed in Section VI. |

## EPR - Section VIII. Final Evaluator's Position

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Appropriate block X'd in black ink |

## EPR - Section IX. Time in Grade Eligible

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Appropriate block X'd in black ink, see para 13 of EPR Shell (last paragraph of second page) |

## EPR - Section X. Commander's Review

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Squadron commander marks "Concur" block in black pen and signs the "Signature" block (NOTE: SAF/AAP signs as squadron commander for SAF EPRs) |

### EPR Shell

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | If Shell is not accurate, annotate the correct information on the EPR Shell and forward any change request via email/memo to SAF/AAP |

### Miscellaneous

| | | | |
|---|---|---|---|
| ❑ | ❑ | ❑ | Spell-check entire report |
| ❑ | ❑ | ❑ | Check capitalization and punctuation against AFH 33-337, The Tongue and Quill |
| ❑ | ❑ | ❑ | Check abbreviations (e.g., DoD vs DOD); spell out first time use where appropriate |
| ❑ | ❑ | ❑ | Hyphenate compound modifiers (e.g., hard-charging officer, state-of-the-art technology) |
| ❑ | ❑ | ❑ | Ensure official course titles are capitalized |

# SAF OPR CHECKLIST
## OPR - Section I. Ratee Identification Data

| Writer | Monitor | SAF | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Block 1-4 & 6-9: Match OPR Shell (block 7 see unit OPR/EPR monitor for proper title) |

## OPR - Section II. Unit Mission Description

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Exact approved text. No deviations |

## OPR - Section III. Job Description

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Block: 1: Matches OPR Shell or provide written justification of desired changes |

## OPR - Section IV. Impact on Mission

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Bullet statements; hyphen, one space and first word capitalized; no bullet more than 3 lines; preferably, single-line bullets; second line of bullet lines up under first word of first line; no periods at end of bullets; no internal punctuation within bullet other than dashes, ellipsis, semicolon, colon, or comma; past tense |

## OPR - Section V. Performance Factors

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | One block X'd for each performance factor |
| ☐ | ☐ | ☐ | Correct form version/date: (20000601) |

### Reverse Side

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Printed head-to-foot |

## OPR - Section VI. Rater Overall Assessment

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Same as Section IV |
| ☐ | ☐ | ☐ | Ensure feedback dates are included |
| ☐ | ☐ | ☐ | Rater name, duty title, and last 4 of SSN match top of OPR Shell; rank is abbreviated |
| ☐ | ☐ | ☐ | Rater signature block is correct and organization has appropriate command level after it |
| ☐ | ☐ | ☐ | Handwrite date actually signed (must be on or after closeout date in block 5) |

## OPR - Section VII. Additional Rater Overall Assessment

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Same as Section IV |
| ☐ | ☐ | ☐ | Ensure "Concur" block is X'd before forwarding to Reviewer |
| ☐ | ☐ | ☐ | Check name, unit, duty title, and last 4 of SSN: abbreviate the rank as shown in the Tongue and Quill |

## OPR - Section VIII. Reviewer

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Same as Section IV |
| ☐ | ☐ | ☐ | Ensure "Concur" block is X'd before forwarding to Examiner/Advisor |
| ☐ | ☐ | ☐ | Check name, unit, duty title, and last 4 of SSN: abbreviate the rank as shown in the Tongue and Quill |

## OPR - Section IX. Acquisition Examiner/Air Force Advisor

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | If the final evaluator on the OPR is not an Air Force officer or DAF official, Air Force will be designated to advise raters on matters pertaining to Air Force performance reports |

### Miscellaneous

| | | | |
|--------|---------|-----|---|
| ☐ | ☐ | ☐ | Spell-check entire report |
| ☐ | ☐ | ☐ | Check capitalization and punctuation against AFH 33-337, The Tongue and Quill |
| ☐ | ☐ | ☐ | Check abbreviations (e.g., DoD vs. DOD); spell out first time used where appropriate |
| ☐ | ☐ | ☐ | Hyphenate compound modifiers (e.g., hard-charging officer, state-of-the-art technology) |
| ☐ | ☐ | ☐ | Ensure official course titles are capitalized |
| ☐ | ☐ | ☐ | For awards, use exact title; title may be abbreviated (e.g., SAF CGO of the Qtr, Jan-Mar XXXX) |

**PROHIBITED STATEMENTS** There are some things you just cannot say on performance reports. AFI 36-2406, Para 3.7 spells out examples of inappropriate evaluator considerations and comments:

Big No-no's
- Do not use the word **"senior"** on any officer OPR except for Colonels and Col selects -- period -- it's considered an implied promotion statement and will be returned
- Do not make **promotion recommendations** for officers, except on the PRF; and then, recommendations are limited to the next higher grade
- Do not make **broad statements** outside the scope of the evaluator's responsibility or knowledge -- you can't say MSgt Jones is the best cop in the Air Force -- keep it realistic
- Do not use **"top 1%"** unless it is fully qualified with another statement such as "in my organization" or "I've known" -- it's ok to stratify, but you must qualify it in terms you are able to speak to
- Do not use **grades higher than the ratee holds** -- you cannot say "Lt Smith performs like a field grade officer" or "Capt Adams is filling a major's billet"
- **Assignment and PME recommendations on reports that are inconsistent with a ratee's current grade** -- recommend an officer for assignments/positions and resident PME that reflect his/her potential and are grade appropriate -- for enlisted, assignments must be grade appropriate
- **PME or advanced academic education for officers** -- evaluators may consider an officer's candidacy, selection for, completion of, or enrollment in PME or advanced academic education during the evaluation process, but may not comment on it, **EXCEPT:** for **field grade officers PRFs**, evaluators may include comments regarding PME and advanced academic education -- on all PRFs, evaluators may comment on officially recognized extraordinary achievement (e.g., distinguished graduate)

Also
- Duty history or performance outside the current reporting period on OPRs/EPRs unless unusual circumstances dictate otherwise -- consult AFI
- Previous reports or ratings may not be mentioned, but should be reviewed prior to new report to prevent repeating prior accomplishments and/or making inappropriate recommendations
- Performance feedback -- do not refer to performance feedback sessions in any area of the performance report except in the Performance Feedback Certification Block
- Events that occur after closeout date -- close out date may be extended by HHQ if required
- Prior events unless previously omitted due to error -- consult AFI
- Conduct based on unreliable information
- Any action against an individual that resulted in acquittal or a failure to successfully implement an intended personnel action
- Confidential statements, e.g., testimony, data obtained by or presented to boards under AFI 91-204, Safety Investigations and Reports
- Actions taken by individuals outside the normal chain of command, e.g., Inspector General, EOT complaints, Congressional Inquiry, etc.
- Recommendation for decoration -- only those actually approved/presented during reporting period
- Race, ethnic origin, gender, age, or religion of the ratee -- don't say Major Smith was the first female evaluator in the squadron; you can mention involvement in cultural or church activities
- Temporary or permanent decertification under the Personnel Reliability Program
- Drug or alcohol rehab programs
- Score data on WAPS score notices or senior NCO promotion score notices
- Performance as a member of a court-martial board
- Family activities or marital status including employment, or volunteer service of member's family
- Officer's decision to accept or decline aviator continuation pay
- Separation or retirement status
- Comments about civilian occupation (Reserve members) unless it directly relates to the military position and enhances their military performance
- Use of profanity (no matter how tempting) is unprofessional and is prohibited
- Punishment received (can mention conduct) as a result of administrative or judicial action

**COMMON ERRORS** Most of these are mentioned elsewhere in this guide, but here's a compilation as presented in "How To Write a Killer Bullet" by CMSgt Herbert C. Rhay, Jr.

No records review -- for EPRs/OPRs you need to know where the ratee has been and is in regard to levels of responsibility -- need to know how much effort is needed to write an effective report -- Critical for effective feedback -- never give counseling without it -- makes ratee feel you care

Poor utilization of space -- fill up the form -- if you don't have enough to write, give the ratee more to do -- cut words, not meaning -- abbreviate where possible -- don't use unnecessary words (eliminate "a," "an," "the")

Weak or unrelated Job Description -- responsibilities in Job Description should relate to accomplishments -- if you can't fill this space, your troop may be underutilized

Listing Job Descriptions as Accomplishments -- don't repeat what was said in Job Description as accomplishments and don't list in Accomplishments what should have been listed in Job Description -- this only says the member did his job or they didn't do much at all

- Inappropriate use of numbers -- don't use dollars when they are unrelated to what the person did, e.g., "toured $55M facility" -- dollar signs draw attention for a reason -- use them appropriately -- don't try to measure the un-measurable, e.g., "boosted morale 33%"

No mission impact -- bullets lack significance to mission and purpose as to why it was written -- that's the bottom line -- what have you done for your Air Force?

Glittering generalities -- says the member was great, the best, truly exceptional but fails to tell how -- absolute waste of space if not supported -- use sub bullets to tell why

High Tech Jargon -- write the report so anyone from any AFSC can understand the report -- it's hard for the board to score what it can't understand, and you never know who's on the board

Best material misplaced -- strongest stuff should go to the bottom line -- eyes naturally go to the bottom of the report -- reviewers often look for the indorser's comments first

Report imbalanced with on/off duty accomplishments -- don't take up too much space for off duty accomplishments and community involvement -- don't use off duty material in indorsements

Weak action verbs -- watch for mundane verbs such as met, maintained, sustained, supported, etc. -- words can show that a member just did his or her job or they can really tell a story -- choose wisely -- try to convey accomplishments that go beyond collecting a paycheck

- Spelling, alignment, spacing errors -- spell check the report -- make sure bullets are lined up -- double check all spacing -- show you and your organization care about the person you're rating

Pride of authorship -- a deadly sin -- always seek advice, counsel, and feedback on how to write the best possible report -- be open to suggestion

# SECTION B

# *ENLISTED PERFORMANCE REPORTS*

The purpose of the Enlisted Performance Report is to provide a reliable, long-term, cumulative record of performance and potential, based on performance for enlisted personnel. Additionally, it also provides senior NCO evaluation boards, the Weighted Airman Promotion System (WAPS) and other personnel managers sound information to assist in identifying the best qualified enlisted personnel for promotion, assignments, awards or other personnel actions. Since the EPR is a permanent record, it is imperative that they are prepared with the utmost quality and accuracy. Please refer to AFI 36-2406 for additional guidance.

## Fundamentals

Think ahead -- it's a good idea to keep a personal log of the ratee's accomplishments throughout the reporting period -- accomplish feedback as required and know when reports are due

Writing an EPR takes practice -- take the time to write a good report for your subordinates

Performance reports should be handled discretely -- write and proofread in private -- limit viewing of the report to only those individuals directly involved in the processing of performance reports

Do not discuss or show ratings to the ratee prior to the report becoming a matter of record -- that's what the feedback sessions are for -- that way there are no surprises at rating time

Do not overrate -- be fair, accurate, and honest in your assessment and ensure job performance is the primary basis for your ratings

Avoid highlighting a single, non-severe incident or a particular negative trait -- consider the entire rating period

Do not mark a person lower than he/she deserves in order to reflect improved performance in subsequent performance reports

'Before beginning to write, determine which promotion category the person fits: (I) Not Recommended for Promotion; (2) Not Recommended for Promotion at this time; (3) Consider for Promotion; (4) Ready for Promotion; or (5) Ready for Immediate Promotion -- after determining the appropriate category, write a performance report that will support your position

- Develop bullet statements for block V, Rater's Comments
- Limit all bullets to no more than three lines -- no practical limit on sub-bullets
- Use of a "Promote" statement sends a strong message to promotion board -- use it wisely
- Do not use comments prohibited in AFI 36-2406, Chapter 3, Para. 3.7
- Write in bullet format in the appropriate blocks -- fill up the space provided unless you are trying to convey a negative message -- white space on a report sends the signal that there wasn't enough material to report on during the rating period

Avoid nicknames, call signs or code names -- names of operations must be in all CAPS

Do not correct ratings (Section III and IV); reaccomplish the report if a rating changes before the EPR is a matter of record

Mark all appropriate boxes (X) before signing the report and forwarding it to the next level

Do not sign or date the EPR before the close-out-date, nor sign blank forms or forms that do not contain ratings

# Writing Tips

Ask yourself what the ratee did, how it was accomplished, and what was the result?  What were the ratee's contributions to the mission, base, and the local community?  The following questions may help you get started:

> Did the member initiate, develop, implement, and follow through with a new plan, project, or program?
>
> Did the member chair any meetings, committees, or subcommittees related to duty performance?
>
> Did the individual volunteer for any projects, additional duties, community involvement, or extracurricular activities?

- What recognition (awards, letters of appreciation, etc.) did the individual receive?
- How did the individual save money, time, or resources in the office?
- What type of leader, both on and off duty, is the individual?

**Record performance in dynamic terms** -- use action words that catch the reader's eye -- words such as "initiated," "spearheaded," or "led" can show the strengths of a good performer
**Focus on results** -- a simple activity can be enhanced by the impact it had on the mission -- use cost, time, and resource savings where possible
**Use the past tense of verbs** to show what the person accomplished during the rating period
**Quantify** -- tell how many, how much
**Stratify** -- TSgt Smith is my number 1 of 7 NCO's

# Preparing EPRs

Use the correct form!  Use AF Form 910 (Enlisted Performance Report) for Airman Basic through TSgt, and AF Form 911 for MSgt through CMSgt.

**Section I - Ratee Identification Data.**  Use the identification data found on the EPR Shell.  Any abbreviations found on the EPR Shell may be used; however, raters are encouraged to expand abbreviations for clarity if necessary.

> **Name** -- enter ratee's last name, first name, and middle initial (if applicable) -- use the default font and style provided by the software default
>
> **SSN** -- enter SSN without a prefix (FV and FR)
>
> **Grade** -- use default font and style provided by the software default -- use Non-AD or Non-EAD for reserve reports as directed by the Shell

- **DAFSC** -- enter the DAFSC (including the prefix and suffix, if applicable) held on the close-out date of the EPR.  Make sure it matches what is reported on the Shell

> **Organization, Command, and Location** -- enter the information as of the close-out date of the EPR -- nomenclature does not necessarily have to duplicate what's on the Shell -- the goal is an accurate description of where and to whom the member belongs on the report close-out date -- For classified locations, enter "Classified" followed by the MAJCOM in parentheses -- use organizational designation, MAJCOM, and location
>
> **Period of Report, Numbers of Days Supervision and Reason for Report** -- use the data reflected on the Shell

**Section II - Job Description (Narrative Format).**  The job description should be written in a way everyone can understand.  Use layman terms to describe activities.  Acronyms should generally be spelled out the first time used.  Assume the reader knows nothing about the duties and responsibilities within the area performed and give context.  Do not include classified information.

- **Duty Title** -- The duty title on the EPR Shell is the one in the Personnel Data System. You may use the computer abbreviations contained on the Shell, or, if the entries are in any way not clear to the reader, you should spell them out. If the duty title on the EPR Shell is not correct, enter the correct duty title on the EPR and submit appropriate documentation to correct the Personnel Data System after marking the change on the Shell. The duty title should be the duty title on file on the close-out date of the EPR.

  **Key Duties, Tasks and Responsibilities** -- Enter a clear description of the ratee's duties. Avoid using jargon or acronyms. Clearly describe the tasks the ratee performs, how selective the ratee's assignment is, and the scope and level of responsibility including the dollar value of projects, equipment, or supplies the ratee manages and the number of people the ratee supervises. You may include any additional duties performed during the reporting period if they influence the ratings and comments. Indicate leadership and management responsibilities.

## Section III - Evaluation of Performance. Raters use this section by placing an "X" in the rating block that accurately describes the ratee's performance. Each block must be marked. Subsequent evaluators should carefully review the report to ensure the ratings accurately reflect the ratee's performance and the comments in Section V are compatible with, and support, the ratings. This area, though not used for promotion points, shows the potential for increased responsibility.

Evaluators may show disagreement with a rating by placing their initials in the rating block they believe more accurately reflects the ratee's performance. If the rating block already contains the initials of a previous evaluator, the next evaluator MUST provide one or more reasons in their comment block on the back of the report.

## Section IV - Promotion Recommendation. When completing or reviewing this section, raters consider the ratee's duty performance and promotion potential and how the ratee compares with others in the same grade and/or same AFSC. Promotion statements must be realistic and valid for promotion to the next grade. Individual making the recommendation must be in a position to substantiate a claim.

## Section V - Rater's Comments. Describe the ratee's performance using bullet format. Make sure to enter date the last feedback session was conducted or reasons the feedback was not conducted; be specific. The date the EPR is signed must be on or after the close-out date, and not before supervision dates shown on Shell.

## Section VI - Rater's Rater Comments (AF Form 911 Only). Rater's raters use this section to support their rating decisions. If the rater's rater is the final evaluator; type in the indorser block "This Section Not Used" and initial the unused signature block. The date the EPR is signed must be on or after the close-out date.

  If the rater's rater agrees (marks the "concur" block) with the rater, then provide information that adds meaning to the EPR -- more significant accomplishments should be commented on here

  If the rater's rater disagrees (marks the "nonconcur" block) with the rater, then the rater must provide comments, including one or more specific reasons for disagreeing -- the rater's rater initials the blocks which he/she deems appropriate

## Section VII - Indorser's Comments. Normally EPRs require indorsement by at least one official in the rating chain who meets specific grade requirements. See AFI 36-2406 for exceptions.

- The indorser may be no higher in the organizational structure than the senior rater -- senior raters must be at least a colonel, or the civilian equivalent (GS-15 or higher), and serving as a wing

commander or equivalent -- for non-EAD enlisted members, a lieutenant colonel serving as a wing or group commander may be the senior rater

The indorser on the AF Form 910 must be the rater's rater unless the indorser is not at least a MSgt or civilian in the grade of GS-7 or higher -- when this occurs, the next official in the rating chain serving in the grade of MSgt/GS-7 or higher indorses the EPR

- On the AF Form 911, the indorser must be at least a major (O-4) or civilian equivalent (GS-12) NOTE: A rater's rater who meets the grade requirement may close out the EPR; however, an official higher in the rating chain than the rater's rater may serve as the final indorser

**Commander's Review.** Commander's Review on EPRs must be conducted by the unit commander or officer so designated as defined in AFI 36-2406. For SAF and supported agencies, including the White House, and Office of the Vice President, SAF/AAP signs as the unit commander.

## Referral EPRs

An EPR that contains one of the following is a referral report (refer to AFI 36-2406 for procedures):

A rating in the far left block of any performance factor on AF Form 910 or 911, Section III,

A rating of "1" (Not Recommended for Promotion) on AF Form 910 or 911, Section IV, or

Comments that refer to behavior not meeting minimal acceptable standards of personal or professional conduct, character, judgment or integrity, and/or refer to disciplinary actions

## Performance Feedback Worksheet (PFW)

Performance feedback is a private, formal communication a rater uses to tell a ratee what is expected regarding duty performance and how well the ratee is meeting those expectations. Raters document performance feedback on the PFW and use the PFW format as guide for conducting feedback sessions where they discuss objectives, standards, behavior, and performance with the ratee. Providing this information helps an individual contribute to positive communication, improve performance, and grow professionally.

Raters use the Performance Feedback Worksheet (PFW) (AF Form 931 for AB -TSgt; and AF Form 932 for SNCOs to document feedback sessions. Feedback should include both the mandatory sessions and a continuous (daily, monthly...) process of informal feedback. The feedback session emphasizes job performance and qualities expected of all enlisted members, such as leadership, organizational and communication skills. Keep in mind that feedback sessions are now required for all enlisted personnel per AFI 36-2406. It is mandatory for both the rater and ratee to keep a copy of the PFW. The only personnel authorized to review PFWs (with the rater's approval) on TSgts and below are the indorser (rater's rater) and the squadron commander; only squadron commanders can review PFWs for MSgts - CMSgts.

Raters must conduct a feedback session within 60 days of the date of supervision began to establish standards and set expectations. A "mid-course" feedback session (after 180-210 days of supervision) is required to assess progress, however, documented feedback sessions can be held more frequently at the rater's discretion and are encouraged when standards and or performance has changed.

If a subordinate asks for feedback, supervisors must provide it within 30 days from request, if at least 60 days have passed since the last feedback session.

# EPR SAMPLES - MSgt and above (AF FORM 911)

| V.  RATER'S COMMENTS |
|---|
| - My #1 of 5 SNCOs--proactive leader--exemplary supervisor who led the busiest section in the division<br>- Established long-term programs to improve support to customers--stockage and issue effectiveness<br>  ratings were consistently highest in command and top 5 in Air Force throughout year--visionary manager<br>  -- His team virtually eliminated out-of-stock situations for customers--herculean effort made to look easy<br>  -- Led section to new heights in all process performance indicators--team continued to exceed every goal<br>- Modernized section's outdated process for tracking late products--on-time rate now at 100% for first time<br>- Devoted two nights a week of off-duty time to ensure the unit's training requirements were met--unselfish<br>  -- All three of his trainees fully qualified in minimum time--significantly improved section's effectiveness<br>- Eliminated over $6 million in serviceable excess inventory in only four months as key member of quality<br>  improvement team--surpassed all expectations--hands-on leadership was the catalyst for the entire effort<br>  -- Simultaneously reduced over $320,000 in due-in excess--greatest decrease in the division's history<br>- Model community leader--President, local food pantry--volunteered off-duty time regularly in soup kitchen<br>- Leader, motivator, skilled tactician--leads the pack--keep him in the front--promote to SMSgt now! |

Rater should attempt to convey leadership and duty performance using hard-hitting facts and figures
Least significant accomplishments listed first, then build; ok to mention community work or education
Good reports on good people are the easiest to write; you'll have to develop the knack for conveying
the appropriate word-picture for each level of ratee you have
PME is mandatory, so commenting on it only wastes space

| VI.  RATER'S RATER'S COMMENTS |
|---|
| - Reorganized division's key section into efficient, streamlined unit--daily product output increased by 50%<br>  -- Spearheaded campaign to increase efficiency--led tiger team credited with saving $22K in one quarter<br>- Excelled at the intricacies of balancing $20M supply account while reducing on-hand inventory by 20%<br>  -- Personal involvement the key to leading his team in eliminating more than 14,000 over-stocked items<br>- Selected as division's SNCO of the Quarter, first quarter 2000--impact on the mission was key to success<br>- #2 of 20 SNCO's in my division--consummate professional--outstanding leader--promote to SMSgt now |

- More significant accomplishments go here -- things the rater's rater would be aware of at his level
- Rater's rater should be descriptive -- tell how well subordinate did, how they did it, and the results
- List awards won -- avoid mentioning community involvement in this section as well as education
- Do not forget promote statement -- PME is mandatory, so commenting on it only wastes space

| VII.  INDORSER'S COMMENTS |
|---|
| - Superb results are his hallmark--keen insight into key processes saved Air Force $60K in contractor costs<br>- Stellar performer and manager--led division's multi-million dollar inventory reduction effort--results-driven<br>  -- Instrumental in bringing the division into compliance with Congressionally-mandated cost guidelines<br>- Key contributor in division's Hammer Award for Reinventing the Government--suggestions right on track<br>- Top 2 percent of my master sergeants--epitome of the professional SNCO--a must for SMSgt this board |

- Indorser highlights leadership abilities and duty performance and includes promotion statement
- Most significant accomplishments go here -- things the senior rater would be aware of at his level
- Big awards above unit level
- Don't use community involvement or education in this section
  PME is mandatory, so commenting on it only wastes space

# EPR SAMPLES - TSgt and Below (AF FORM 910)

## V. RATER'S COMMENTS

- Dedicated NCO! Extremely competent--organization's expert in workflow and life cycle info management
- Provided cradle-to-grave support for all products generated in the busiest front office in the directorate
  -- Managed office suspense tracking system flawlessly--ensured critical products were on target, on time
  -- Maintained a 100% on-time rate for all products--a superhuman effort considering this is the Pentagon!
- Identified discrepancies in unit leave program--corrected in minimal time and got program back on track
- Ensured critical information requested by division's leadership was accurate and timely--a stickler for detail
- Controlled unit's IMPAC program--managed multiple accounts--zero discrepancies--over $10K monthly
- Managed information technology supply needs with zero downtime--no waiting on hardware consumables
  -- Ordered over $5K worth of computer supply parts and distributed to work centers--skillful management
- Realigned Government Travel Card Program responsibilities to better track late payments--100% on time
  -- Designed innovative training program for government travelers within the division--ensured compliance
- Dedicated to professional development--completed CCAF degree in Human Resources Management
- My choice for high-vis front office position--extremely poised--ready for more responsibility--promote now

- Notice the emphasis on the technical aspects of the job as opposed to the SNCO report which
  focused more on the strategic aspects
  Don't forget promotion statement, if appropriate

## VI. RATER'S RATER'S COMMENTS

- Division's #1 Information Manager--cut avg turn-around time on key products from over 2 weeks to 2 days
- Organized the division's first-ever Personnel Products Training Course--innovative--taught 20 new officers
- Saved 20+ man-hours per month by automating recurrent training requirements--a real force multiplier
  -- Programmed brilliant training tool--keen eye on mission--saves division's action officers valuable hours
- Selected as directorate's NCO of the Year for 2000--Information Manager of the Quarter, first quarter 2000
- Makes a positive first impression and keeps on impressing with her abilities--promote ahead of peers

Rater's Rater should state results clearly using actions and results (facts and figures) of those actions
Most significant accomplishments go here

## SECTION C

# *OFFICER PERFORMANCE REPORTS*

The purpose of the Officer Performance Report (OPR) is to record the evaluation of an officer's performance over a specific period. OPRs provide a permanent, long-term record of an officer's performance and leadership potential based upon his or her performance.

This Section provides instructions and tips on preparing the Officer Performance Reports (AF Form 707A - Field Grade Officer Performance Report, and 707B - Company Grade Officer Performance Report) and the Performance Feedback Worksheet (AF Form 724A/B). Please refer to AFI 36-2406 for additional guidance on preparing OPRs and PRFs.

## Fundamentals

The OPR is an assessment of *duty performance and performance as an officer*, and should reflect the leadership potential based upon that performance. Raters should not consider previous Promotion Recommendation Form (PRF) recommendations, promotion eligibility, Officers' Club membership, marital status, family activities, etc. In addition, promotion recommendations (overt or implied) are prohibited. Promotion recommendations are reserved for the PRF (AF Form 709) when the officer meets a promotion selection board. However, recommendations to attend the next level of PME or the officer's next assignment are permitted. See p. 7 in this guide and AFI 36-2406 for specifics on prohibited statements.

OPRs become a permanent part of the officer's records and should be written with that in mind. They must be stand-alone documents. Board members, assignment managers, commanders, and supervisors read OPRs to understand performance in previous assignments, and make recommendations for future assignments, school attendance, or other management decisions based on these reports.

If an incident/negative trait warrants documentation to hold a member accountable, then this should also be reflected in the OPR.

## Writing Tips

The OPR should focus on *duty performance*. The OPR must clearly illustrate both abilities and potential. The focus should be an accurate assessment of performance and recommendation for the next level of responsibility.

**Record performance in dynamic terms** -- instead of "proficient," use "undisputed expert"

**Focus on results, not just activity** -- instead of "improved turnaround time," use "increased sortie rate by 12% and saved $30,000/month"

**Use terms understood across the Air Force** -- instead of "...FWIC's top ACEVAL-AIMVAL analyst," use "...top expert on newest targeting system -- force multiplier and life saver"

**Focus on primary duty performance rather than additional duties** -- Save impact bullets for last. "Company Grade Officer of the Year," etc.

# Preparing OPRs

**Section I - Ratee Identification.** Provided to the rater from the Personnel Data System (PDS) or the OPR Shell. This information is also available through other data products provided by the MPF.

**Section II - Unit Mission (Narrative Format).** Describes the primary responsibilities of the unit. It is prepared and maintained by the unit and provided by the reviewer. The unit mission description is the same for every member in the unit.

**Section III - Duty Title and Job Description (Narrative Format).** The ratee's duty title describing key duties, tasks, and responsibilities which help put the ratee's performance in perspective. The purpose of the job description is to explain duties performed and the officer's level of responsibility. Don't make the mistake of underestimating the importance of this section of the OPR. This is your opportunity to put the importance of what your officer does into perspective with others in their peer group. Ensure the duty title is documented in PC-III, or enter it on the shell. The following concepts will assist you to prepare a strong job description:

**Use duty titles consistent with manning documents and the job actually being performed** -- instead of the job title "Assistant Deputy Chief..." for an officer in a three-person shop, use "OIC Tactical Plan Development" -- then use the right words to convey the job's importance.

- **Ensure duty titles describe the actions performed** -- instead of "Aircraft Maintenance Branch Chief," use "Aircraft Avionics and Life Support Systems Branch Chief"

- **Relate the job description to the mission description** -- instead of "...manages mobility issues for on-going and contingency deployments," use "...manages mobility requirements for 170 pilots and maintainers deployed bare base during Operation PROVIDE COMFORT"

 **Report only those additional duties related to the mission** -- assistant snack officer doesn't add much to the report (hopefully)

**Section IV - Impact on Mission Accomplishment.** This section is designed specifically for the rater to document performance unique to the officer's primary duties. Some promotion board members depend on this section of the OPR to provide the most telling information about the individual they are evaluating. This is largely due to the OPR's design -- here the rater documents the ratee's primary duty performance and how it contributed to, or detracted from, accomplishment of the unit mission. Since this section is limited to NINE lines, it is critical to choose words and phrases which are concise and action-oriented.

When deciding what to write in this section, keep the following in mind -- *The rater writes concise narrative comments in bullet format with no more than three lines per bullet*

 Use specific examples to demonstrate impact of actions

 Begin your bullets with strong, action-oriented words

 Don't use valuable space with lead-in titles for bullets

 Use multiple examples to demonstrate impact and results

**Section V - Performance Factors.** The six factors listed are qualities and skills required of all officers in the performance of their duties.

**Section VI - Rater Overall Assessment.** Rater comments on additional accomplishments related to the unit mission, assesses the potential based on performance, and makes other comments, explanations, and recommendations. *The rater will include the date the last feedback session was performed, or the reason(s) feedback was not performed.*

**Section VII - Additional Rater's Over-all Assessment.** The additional rater has a broader perspective from which to compare overall performance and performance-based potential. *The additional rater will mark the concur or nonconcur block.*

**Section VIII - Reviewer.** The reviewer uses this section to indicate concurrence or nonconcurrence with the additional rater's comments. Comments are entered *only* when the reviewer nonconcurs with the additional rater or it is a referral report. If the rater or additional rater is also the reviewer, put the statement, "Rater" or "Additional Rater is also the Reviewer" as appropriate in this block.

## Referral OPRs

An OPR that contains one of the following ratings is a referral report (please refer to AFI 36-2406 for specific guidance on referral reports):

Any performance factor in Section V marked "Does Not Meet Standards"

Any comments in the OPR that refer to behavior incompatible with minimum standards of personal conduct, character, integrity, or misrepresentation of facts in official statement or documents, serious mismangement of personal or government affairs, unsatisfactory progress in the Weight Management Program or Fitness Improvement Training · Program, confirmed incidents of discrimination or mistreatment, illegal use/possession of drugs, etc.

## Veiled Promotion Statements

As a general rule, prohibited promotion statements are any comments comparing an individual to officers of higher rank, or alluding to a higher ranking position. All such comments are prohibited. The term "senior" is specifically prohibited since it is commonly used when referring to colonels or general officers.

While it is impossible to provide an all-inclusive list of prohibited statements, some examples are:

"LT COL ____ is senior officer material." (The term "senior" is reserved for colonel and above)

"Capt ____ has excelled in a Major's billet." (Refers to a rank higher than the one the individual currently holds)

"Major ____ should be a group commander now." (Recommends the individual for a position two grades higher than the ratee—not normal progression.)

- "Capt ____ is ready for our toughest field grade jobs." (Compares a company grade officer with higher ranking (field grade) officers)

While promotion statements are prohibited, an evaluator may make recommendations to select officers for a particular assignment, PME, continuation, or conditional reserve status (IAW AFI 36-2406). There is a fine line between an assignment recommendation and an implied promotion statement. When making an assignment recommendation, there may be no reference to a higher grade. The reference must be consistent with the officer's appropriate professional career progression; this includes command recommendation. Some acceptable examples are:

> "Make Capt _      an MPF Chief" or "Make Capt      an IPT lead." (Appropriate progression)

> "Send Major      to ISS." (Appropriate PME progression)

> "Make him an Ops Group Commander." (On a Major OPR)

> "After SSS, assign to Air Staff." (Appropriate PME with follow-on assignment)

Examples of **unacceptable** statements are:

> "Make Lt      an MSS Commander." (Inappropriate next level of progression)

> "Send Capt ____ to ISS after selection to Major." (Reference to ISS is appropriate, but cannot imply promotion by saying "After selection to Major")

> "Senior Service School in '95, Group Commander in '96, Wing Commander in '98." (Goes beyond the scope of the next assignment)

Broad reaching statements should be avoided unless the rater has the experience/knowledge to support that claim. For example, instead of saying "Number one maintenance officer in the Air Force" a more appropriate and realistic comment would be to say "My top captain" or "The best maintenance officer I've worked with in my 22 years in the Air Force." Stratification is encouraged, but must be within the rater's scope.

## Performance Feedback Worksheet (PFW)

Performance feedback is mandatory for all officers, 2Lt - Col. Feedback should include both the mandatory sessions and a continuous (daily, monthly...) process of informal feedback. The purpose of performance feedback is for a rater to tell the ratee what duty performance is expected and how well the officer is meeting those expectations. Providing this information to officers helps them improve their performance and grow professionally. Raters use the PFW as a guide to conduct and structure performance feedback sessions. There should be no surprises when the ratee receives an OPR.

- Raters use the PFW (AF Form 724A/B) to document feedback sessions. The feedback session emphasizes job performance and qualities expected of all officers, such as leadership and organizational and communication skills. The rater and ratee should both keep a copy of the PFW. The PFW may not be reviewed by anyone other than the rater and ratee.

  Raters should conduct a feedback session within 60 days of the beginning of the period of supervision to establish standards and set expectations. A "mid-course" (normally 180 - 210 days of supervision) feedback session is encouraged at least once during the period of supervision to assess progress. Note: Documented feedback sessions can be held more frequently providing 60 days have passed since the last feedback session or at the rater's discretion.

# OPR SAMPLE COMMENTS

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**IV. IMPACT ON MISSION ACCOMPLISHMENT**

- Led efforts that resulted in historic gains for our airmen and kept AF readiness at the forefront in Congress
  -- Spearheaded quality of life improvements--pay table reform, retirement redux repeal, significant pay raise
  -- Garnered over $200M for new family housing, $225M for housing allowances, and increased bonuses
- Developed MAJCOM Top Readiness Concerns brief for OSD--provided the real story on AF readiness
- Guided analysis of impact of long-term contingency operations on Air Force people, budget, and equipment
- Protected programs vital to AF future--AF lead for C-5 engine upgrade, $200M effort--flawless execution
- Authored $10M budget proposal and defended to Congress on the Hill--program fully funded as a result
- Forged DoD-wide definition of TEMPO for $100M Congressional Report on Personnel TEMPO legislation
- Advised CSAF on Aerospace Expeditionary Force readiness prior to deployment--impacted all AEF units

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What did the member do to help the unit meet its mission?
Look for impact beyond the office
The use of percentages, figures and time frames help clarify the result

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**VI. RATER OVERALL ASSESSMENT**

- Division's #1 of fifteen hand-picked action officers--impact will be felt for years to come--absolutely superior
- Sought out for his expertise--called on repeatedly by Joint Staff and Air Staff for expertise on deployments
- Saved critical program from Congressional axe--skillfully navigated program through the budget process
  -- Restored $15M to CSAF/SECAF priority--without his expert guidance, the program would have folded
- The lead action officer for Fall 2000 CORONA prep--personally briefed CSAF--helped mold AF strategy
- Crafted division's response to Congressional inquiries--selflessly volunteered for late-night prep sessions
- Developed contractor contacts throughout AOR--reduced overhead cost by 42% in key program element
- Natural choice for directorate's Action Officer of Yr, 2000--led programming action for $83M fighter upgrade
- Shining example on HQ Staff--absolute all star--a must for ISS in-residence then on to squadron command

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- Stratify -- my number one of seven; my number two of ten
- Quantify -- how many, how much?
- Mention awards -- anything to help differentiate
  Make school recommendations for PME and next assignment -- if missing, the message is negative

---

**VII. ADDITIONAL RATER OVERALL ASSESSMENT**

- Truly superb staff officer and leader--directorate's go-to guy for toughest financial management issues
  -- Led $22M program through Congressional minefield--tenaciously protected MILSTAR follow-on program
- Designed future AF concept team for implementation--avoided over $18K in contracted cost to Air Force
- Selected to brief Congressional panel--never missed a beat--personally saved $15M multi-year contract
- Number 2 of my 45 action officers--trusted and respected--send to operational command after ISS in-res

---

Relative ranking among peers
Bottom line -- make it count
Tell the board exactly what you think of ratee and where you think he should go next

# SECTION D

# *PROMOTION RECOMMENDATION FORM*

This section provides guidance for processing the Promotion Recommendation Form (PRF) (AF Form 709) for Lt Cols and below. The PRF is used to assess an officer's performance-based leadership potential and used for the senior rater to communicate a promotion recommendation to the Central Selection Board. It is clearly the single most important document in the officer's selection folder. PRFs are *NOT* a permanent part of the ratee's record. All PRFs are removed from the officer's personnel folder 30 days after the Central Selection Board. As such, the standard for formatting is slightly different. The PRF is based on OPRs which serve as the source documents if there are any questions about what's contained in the PRF. Guidelines for abbreviations and punctuation are less strenuous for PRFs due to their transient nature. Please refer to AFI 36-2406 for additional PRF guidance.

## Fundamentals

Consider performance-based leadership potential, the assessed capability of an officer to serve in a higher grade as demonstrated by performance in his or her current position and in past jobs or positions

Consider the level of duty performance, demonstrated expertise in a multitude of skills important to the Air Force officer (e.g., leadership, team building, decision-making, communication, organizational skills, etc.), and the willingness to go beyond what is specifically required of the job

Paint a picture using action words to convey the message

### Who Assesses Potential?

The senior rater is solely responsible for awarding promotion recommendations and completing PRFs. He or she has personal knowledge, or access to knowledge, of both the officer's most recent and cumulative performance.

## Preparing the PRF

The senior rater completes the PRF no earlier than 60 days before the selection board (see AFI 36-2406 for detailed instructions).

**Sections I, II, and III (Narrative Format).** These sections are essentially the same as their respective sections on the OPR. Duty title MUST match the PRF notice provided by the orderly room. If a discrepancy occurs, action must be taken by the rater to ensure the MPF submits a request for a title change to AFPC.

**Section IV - Promotion Recommendation (Bullet Format).**  This section explains to the promotion board what makes the officer qualified for promotion, and supports recommendation given in Section IX.

> Comments addressing completion or pursuit of PME are allowed if a significant event occurred, such as DG or completion not indicated in records; however, if the officer completed the PME or advanced education, it should already be identified in the officer's record

> Advanced Academic Degree is masked for Line of the Air Force officers being considered for promotion to the grade of major

> Do not use comments concerning prior PRF recommendations

> The bullets should capture accomplishments throughout the officer's career which bear on promotion -- for junior officers, the bullets should concentrate on job performance and depth of experience -- for more senior officers, the bullets should blend performance in the primary duty area and broader career accomplishments focusing on breadth of experience

**Section V - Promotion Zone.**  This entry indicates whether the PRF was accomplished for a Below-the-Promotion-Zone (BPZ) officer or an officer in the In/Above-the-Promotion Zone (I/APZ) category.  The BPZ promotion opportunity for Major was eliminated in 1998.

**Section VI - Group Size.**  In most cases, this section will be marked N/A.  Senior raters will be notified when additional information is required.

**Section VII - Board.**  The board identification information is included on the PRF notice the senior rater receives from the orderly room.

**Section VIII - Senior Rater ID.**  The senior rater ID is a five-digit code used to identify the position of the senior rater.  It also is provided on the PRF notice.

**Section IX Overall Recommendation.**  The senior rater can make one of three recommendations: "Definitely Promote (DP);" "Promote (P);" or "Do Not Promote this Board (DNP)."

Each senior rater is entitled to a specific number of **"Definitely Promote"** recommendations based on the BPZ or IPZ population.  A "DP" recommendation conveys to the selection board the senior rater's opinion that the strength of the officer's record of performance warrants promotion with minimum regard to broader considerations.

A **"Promote"** recommendation means the officer is fully qualified for promotion and should compete on the basis of both performance and broader considerations.  A "Promote" means the senior rater believes the officer should be promoted, however, not every officer with a "Promote" can be promoted to the next grade (see data below).  So, the issue is how raters can help the board choose within the qualified "promotes."  One possible way to send that signal is to use a statement such as: "If I had one (or two or three) more DPs..."  Don't say, "If I had one more DP" more than once!

| OFFICERS PROMOTED WITH A PRF "PROMOTE" RECOMMENDATION |
| --- |
| - To O6:  Estimate 25 percent of IPZ eligibles with "Promotes" will be selected |
| - To O5:  Estimate 35 percent of IPZ eligibles with "Promotes will be selected |
| - To O4:  Estimate 40-50 percent of IPZ eligibles with "Promotes will be selected |

A "**Do Not Promote this Board**" is self-explanatory; however, if an officer has a date of separation, an approved retirement date, or is unsure about career intent, this does not necessarily detract from performance-based potential, and should not be the "sole" consideration for a "Do Not Promote this Board" recommendation.

**Section X - Identification.**  The senior rater's name, grade, organization, duty title, SSN, and signature are entered in this section.

> The senior rater identification code (e.g., AAZ01) is the driving force for the PRF signature.  If a senior rater PCSs after the PRF cutoff date and has signed the PRF, the new senior rater can make changes to the PRF and will attend the Management Level Review (MLR), if he or she has eligible officers, if the Management Level has an MLR.

> If a senior rater PCSs and the new senior rater is not on station, the officer filling in MUST be appointed on general orders to perform senior rater responsibilities.

## Below the Zone "Promote" PRFs

Only the Senior Rater will determine if there will be comments on Below-the-Promotion-Zone (BPZ) PRFs with a "Promote" recommendation.

## Narrative-Only PRFs

Narrative-only PRFs are required on all officers being reassigned PCS/PCA as a permanent party student or patient, regardless of promotion eligibility.

- The narrative-only PRF gives the senior rater a chance to provide a promotion recommendation as the "losing" senior rater (do not mark Section IX, AF Form 709).  Officers eligible for promotion with narrative-only PRFs will compete for promotion recommendation (e.g., "Definitely Promote") at the HQ USAF Student Evaluation Board.  The narrative-only PRF could be a prime part of the officer's record which meets a central selection board while the officer is a student or patient, so it's important to write it well.

  **Exception:**  Do not complete narrative-only PRFs on  Colonels and colonel selects, and captains or captain selects with less than 3 years time-in-grade upon completion of schooling.

**Note:**  The narrative-only PRFs must be completed 30 days prior to the officer's departure and forwarded to the officer's servicing MPF.

# PRF SAMPLE COMMENTS

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**IV. PROMOTION RECOMMENDATION**

- You've got 9 lines to make your officer's best sales pitch to the board -- make them count!
- Relative ranking (best relative rank or laudatory comment)
- Duty history review / key accomplishments
- Early greatness / early successes (competitively selected for..., DG, HQ/base of the quarter/year awards
  -- Breadth of experience (does everything well)
  -- Expertise + toughest challenge tackled
- Explain any duty history record anomalies (TOS, squares, limited scope)
- Today's performance (why he/she ranks so high)
- Bottom line leadership potential (one line summary of career) / state PME REC

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General overview of what goes in the block

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**IV. PROMOTION RECOMMENDATION**

- Incredible from day #1--unrivaled success at every level--squadron, wing, Air Staff, ops, AF Secretariat
- A standout!  DG out of OTS and never let up--DG at Undergraduate Missile Training--Wing Company Grade Officer of the Year out of 700 eligible--ACC's Company Grade Officer of the Year--Innovation Award winner
- Selected early for the toughest jobs--flight commander, Stan Eval Crew, Missile Crew CC, Air Staff, IG duty
- Functional expert--led flight to "Outstanding" rating from ACC IG--Outstanding Performer, ACC IG--2 times!
- Unparalleled leader--led units to elite ranks; SAC's Best ICBM Operations, Service's Award for best unit, '98
- High-vis Air Staff superstar--guided corporate structure decisions--resulted in $20B plus up for AF budget
- Hand-picked as two-star's exec--extremely poised--routinely deals with issues at national command level
- My #1 choice for promotion--reputation for excellence--definitely promote and send to ISS, ops command

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- Strong recommendation -- shows early success and continued excellence
- Clearly shows potential
- Hard-hitting -- shows results

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**IV. PROMOTION RECOMMENDATION**

- Superstar!  Vast proven talent in operations, training and acquisition--untapped potential
- Accomplished aviator! Excellent T-38 instructions and F-16 ORI laudatories; led pilot force
- Brilliant technical leadership of all activities on F-16 C/D engine
  -- Solved formidable safety of flight defect--acknowledged for saving F-16 through TCTO action
  -- Programs accepted at Under Secretary level; ensured lessons learned addressed for future
- Selected as flight commander ahead of peers--led unit through three operational deployments
- Served as Executive Director, Staff Action Group--built a reputation for timely, accurate information
- Picked for AF Secretariat position--managed multi-million dollar contract--ensured extra dollars for programs
- Solid gold performer--one of my best--squadron commander in the making--a must promote

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- Not as strong
- No clear stratification
- Less meat -- fewer results -- less impact
  No school recommendation

# SECTION E

# *REFERENCE MATERIAL*

## ACTION VERBS

| | | |
|---|---|---|
| Acquired | Established | Procured |
| Activated | Estimated | Produced |
| Administered | Executed | Programmed |
| Advised | Expanded | Proved |
| Analyzed | Expedited | Promoted |
| Anticipated | Extracted | Provided |
| Appointed | Forecasted | Published |
| Appraised | Formed | Purchased |
| Approved | Framed | Recommended |
| Arranged | Hired | Recruited |
| Assessed | Improved | Redesigned |
| Audited | Increased | Reduced |
| Augmented | Initiated | Rejected |
| Averted | Instigated | Regulated |
| Avoided | Inspected | Related |
| Bought | Instructed | Renegotiated |
| Built | Interpreted | Reorganized |
| Captured | Interviewed | Reported |
| Centralized | Introduced | Researched |
| Conceived | Invented | Resolved |
| Commanded | Investigated | Reviewed |
| Converted | Launched | Revised |
| Corrected | Led | Revitalized |
| Controlled | Liquidated | Saved |
| Created | Localized | Scheduled |
| Cultivated | Located | Selected |
| Counseled | Maintained | Settled |
| Decreased | Managed | Simplified |
| Decentralized | Marketed | Sold |
| Defined | Minimized | Solved |
| Demonstrated | Modernized | Standardized |
| Designed | Monitored | Stimulated |
| Determined | Negotiated | Studied |
| Developed | Obtained | Supervised |
| Devised | Operated | Supported |
| Documented | Original | Taught |
| Doubled | Performed | Terminated |
| Edited | Pioneered | Tested |
| Employed | Planned | Tightened |
| Enforced | Prevented | Traded |
| Ensured | Processed | Trained |

## VIVID DESCRIPTIONS

| | | |
|---|---|---|
| My #1 of 7 assigned | Top 1% I've supervised | Best AO in the Division |
| Expertly crafted | Shrewd leadership | Performed brilliantly |
| Superb assessment | Without peer | Pivotal contributor |
| Sole architect | Firestarter | Top-notch |
| Catalyst for the process | Masterfully orchestrated | Inspirational leadership |
| Energized | Skillfully engineered | Epitome of effort |
| Keenly adept | Jump started | Totally determined |
| Artfully blended | Critical influence | Unsurpassed excellence |
| Cradle to grave | 100% accurate | Unbounded potential |
| Truly superb | My number one | There is no better |
| Does it all | Well-rounded | Without peer |
| Absolutely first-rate | Flawlessly performed | Spearheaded the campaign |
| Continuously surpasses | Innovativeness | Constantly amazes |
| Clearly superior | The obvious choice | Brought to life |
| Diligent efforts | Extremely able | Hard charging |
| Invaluable contributions | Best I've ever seen | Premier leadership |
| Multi-talented | The key that unlocked... | There is no other |
| Exemplary performance | Outshines peers | Unique expertise |
| Extraordinarily capable | My very best | Results are the hallmark |

## HELPFUL ADJECTIVES

| | | | | |
|---|---|---|---|---|
| absolute | accurate | active | adept | adroit |
| capable | clear-thinking | comprehensive | competent | complete |
| concise | confident | conscientious | constant | consistent |
| creative | decisive | dedicated | dependable | determined |
| diligent | dynamic | eager | efficient | effective |
| enthusiastic | energetic | excellent | enterprising | exceptional |
| extraordinary | extreme | factual | favorable | flawless |
| flexible | forceful | foremost | genuine | hardworking |
| honest | imaginative | independent | industrious | innovative |
| intense | involved | keen | knowledgeable | loyal |
| major | mature | maximum | meaningful | motivated |
| objective | observant | optimal | optimistic | orderly |
| organized | original | outstanding | patient | perceptive |
| perfect | persevering | persuasive | poised | polished |
| positive | powerful | practical | precise | productive |
| professional | prominent | prudent | punctual | quick |
| rational | realistic | reliable | remarkable | resourceful |
| respectful | responsive | self-confident | self-directed | significant |
| sincere | sound | special | splendid | stern |
| strong | successful | superior | supportive | systemic |
| tactful | thorough | trustworthy | understanding | unique |
| unlimited | unusual | valuable | versatile | vigorous |
| winning | worthy | | | |

## COMMON ACCRONYMS - Some, not all

| | | | |
|---|---|---|---|
| ACC | Air Combat Command | JFC | Joint Forces Commander |
| AEF | Air Expeditionary Force | JTF | Joint Task Force |
| AETC | Air Education and Training Command | MAJCOM | Major Command |
| AF | Air Force | MPF | Military Personnel Flight |
| AFI | Air Force Instruction | NAF | Numbered Air Force |
| AFMC | Air Force Materiel Command | NATO | North Atlantic Treaty Alliance |
| AFOSI | Air Force Office of Special Investigations | NCO | Noncommissioned Officer |
| AFPC | Air Force Personnel Center | NCOA | Noncommissioned Officer Academy |
| AFR | Air Force Reserve | OJT | On-the-Job Training |
| AFRC | Air Force Reserve Command | OPR | Officer Performance Report |
| AFROTC | Air Force Reserve Officer Training Corps | OPSEC | Operations Security |
| AFSC | Air Force Specialty Code | ORI | Operational Readiness Inspection |
| AFSOC | Air Force Special Operations Command | OSD | Office of the Secretary of Defense |
| AFSPC | Air Force Space Command | PACAF | Pacific Air Forces |
| AMC | Air Mobility Command | PCA | Permanent Change of Assignment |
| ANG | Air National Guard | PC-III | Personnel Concepts III |
| AO | Action Officer | PCS | Permanent Change of Station |
| AOC | Air Operations Center | PFE | Promotion Fitness Examination |
| AWACS | Airborne Warning and Control System | PME | Professional Military Education |
| BPZ | Below Promotion Zone | POTUS | President of the United States |
| BTZ | Below The Zone | PRP | Personnel Reliability Program |
| C3I | Command, Control, Comm, Intel | RC | Reserve Component |
| CCAF | Community College of the Air Force | RDT&E | Research, Development, Testing and Eval |
| CINC | Commander in Chief | RNLTD | Report No Later Than Date |
| CJCS | Chairman, Joint Chiefs of Staff | SAC | Strategic Air Command |
| COMAFFOR | Commander of Air Force Forces | SAF | Air Force Secretariat |
| COMSEC | Communications Security | SECAF | Secretary of the Air Force |
| CONUS | Continental United States | SECDEF | Secretary of Defense |
| CRO | Change of Reporting Official | SNCO | Senior Noncommissioned Officer |
| DoD | Department of Defense | SNCOA | Senior NCO Academy |
| DRU | Direct Reporting Unit | STEP | Stripes for Exceptional Performers |
| EPR | Enlisted Performance Report | TDY | Temporary Duty |
| FOA | Field Operating Agency | UAV | Unmanned Aerial Vehicle |
| FOIA | Freedom of Information Act | UCMJ | Uniform Code of Military Justice |
| FOUO | For Official Use Only | UIF | Unfavorable Information File |
| IG | Inspector General | UN | United Nations |
| IMA | Individual Mobilization Augmentee | US | United States |
| IO | Information Operations | USAF | United States Air Force |
| IP | Instructor Pilot | USAFA | United States Air Force Academy |
| ISS | Intermediate Service School | USAFE | United States Air Forces in Europe |
| JCS | Joint Chiefs of Staff | VCJCS | Vice Chairman, JCS |
| | | WAPS | Weighted Airman Promotion System |