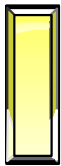
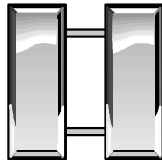
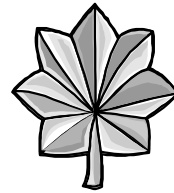
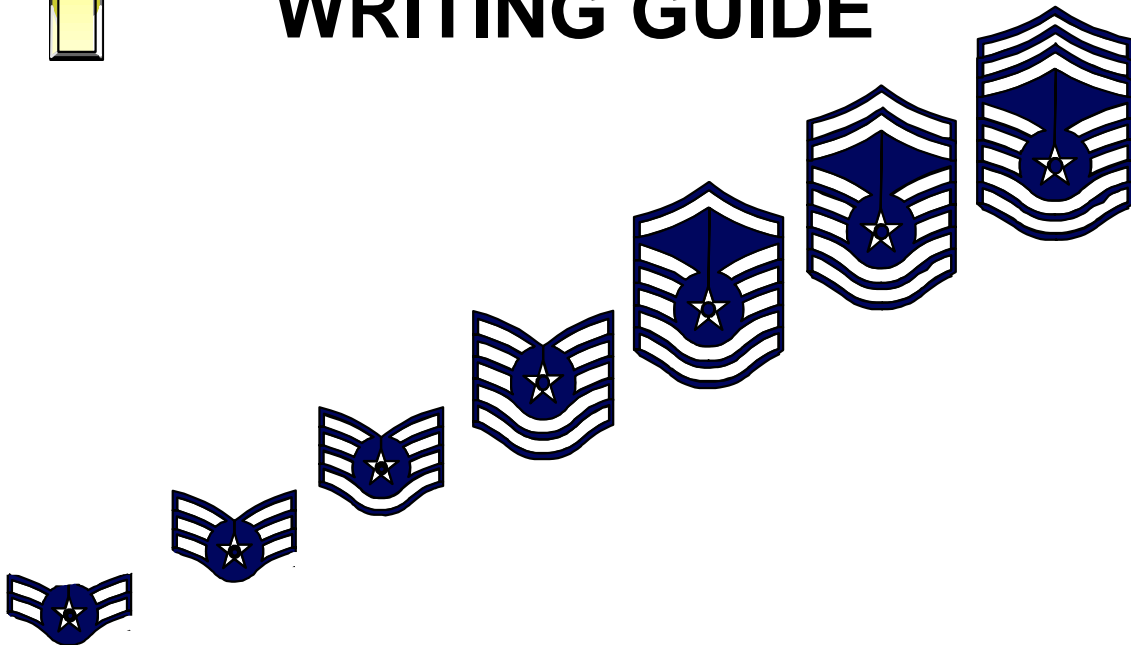


**HQ Air Reserve
Personnel Center/
HQ Air Force
Reserve Command**



**EPR/OPR/PRF
WRITING GUIDE**



November 2005

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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 when proofreading your reports prior to submission. Please read the rest of the guide for greater detail.

THE BASICS

- **Know when your personnel require performance reports** -- don't wait on the Report Shell to kick out -- it's your responsibility -- your CSS will remind you, but ultimately, it's up to you as the supervisor to know when your personnel's reports are due
- **Review the Report Shell THOROUGHLY** -- there's a ton of information on it
- **Review the ratee's previous performance reports** -- make sure you know the person you're rating! The AFI requires that you review the PIF **BEFORE** the report is written
- **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 is sent 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. 4 & 5)
- **Use the correct AF Form** -- simple, yet surprisingly, often overlooked

AB through TSgt	AF IMT 910, latest version
MSgt through CMSgt	AF IMT 911, latest version
2Lt through Capt	AF IMT 707B, latest version
Major through Colonel	AF IMT 707A, latest version
- **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 internal suspense dates and REMEMBER all reports are due to ARPC 45 days after close-out date**
- **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 your CSS by their established suspense date.**

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 such as "the best personnel technician ever" or "Top 3 AF Wide".
- 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. 3) 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, and capital letters in right place...)
- Do your homework; review previous reports, PIF, UIF if applicable

Don't

- Use prohibited statements (see p. 4 & 5) 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:

"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.

My #1 Action Officer"

No ambiguity. Short; to the point. Lets the board know exactly where the ratee stands.

Word Choice 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):

	Vivid			Mundane	
Cut	Saved	Expertly	Capable	Assisted	Participated

Created	Spearheaded	Rapidly	Dependable	Aided	Reviewed
Drove	Developed	Persuasive	Effective	Contributed	Adequate
Guaranteed	Deftly	Dynamic	Coordinated	Employed	Fine
Infused	Diplomatically	Instituted	Sturdy	Ready	Maintained
Led	Energetic		Monitored	Potential	

Context 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"

Stratification 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 ratee's 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. 4 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 17 for an expanded list.

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

Noncommon acronyms: There are many acronyms that we use that are common to the AF Reserve world but are not considered "common acronyms" when it comes to evaluations. Some examples are IMA and PPIR. The bottom line is, if it is not in the list above or the expanded one on page 17 of this guide, spell it out.

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 MISPELLED 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	timeline
handpicked	topnotch
homepage	turn in, turn-in (depends on context)
man-hours	Website
master's degree	work center
Master's Degree in Management	work force
material (what a thing is made of, raw material)	work load
materiel (relating to weapons, equipment of arms)	Worldwide
ensure (to make sure) insure (insurance)	Pentagon, Washington DC
led vs lead	Reserve vs reserve (when to use)

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, and reference to PME is prohibited except for awards earned while attending an in-resident program.
- **PME or advanced academic education for officers** – When preparing OPRs, evaluators will not comment on selection status on the schools list, selection for, completion of or enrollment in developmental education or advanced academic education. When preparing PRFs, senior raters may only comment on officially recognized extraordinary achievements documented in the AF IMT 475. When stratifying officers on OPRs and PRFs, evaluators will not consider completion/non completion of non-resident DE if the officer is on the school select list or their Select/Candidate status.

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 unmeasurable, 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 discreetly -- 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: (1) 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 (recommended no more than two 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. or page 4 of this guide
- 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 (Operation DESERT STORM)
- 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 NCOs

Preparing EPRs

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

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 IMT 910 or 911, Section III,
- A rating of "1" (Not Recommended for Promotion) on AF IMT 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 IMT 931 for AB -TSgt; and AF IMT 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 IMT 911)

V. RATER'S COMMENTS

- My #1 of 5 SNCOs--proactive leader--exemplary supervisor who led the busiest section in the division
- Established long-term programs to improve support to customers--stockage and issue effectiveness ratings were consistently highest in command and top 5 in Air Force throughout year--visionary manager
 - His team virtually eliminated out-of-stock situations for customers--herculean effort made to look easy
 - Led section to new heights in all process performance indicators--team continued to exceed every goal
- Modernized section's outdated process for tracking late products--on-time rate now at 100% for first time
- Devoted two nights a week of off-duty time to ensure the unit's training requirements were met--unselfish
 - All three of his trainees fully qualified in minimum time--significantly improved section's effectiveness
- Eliminated over \$6 million in serviceable excess inventory in only four months as key member of quality improvement team--surpassed all expectations--hands-on leadership was the catalyst for the entire effort
 - Simultaneously reduced over \$320,000 in due-in excess--greatest decrease in the division's history
- Model community leader--President, local food pantry--volunteered off-duty time regularly in soup kitchen
- 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 is prohibited from being included except if awards were earned during attendance, for example: garnered the John Levitow Achievement Award, Distinguished Graduate, or Commandant Academic Achievement Award...

VI. RATER'S RATER'S COMMENTS

- Reorganized division's key section into efficient, streamlined unit--daily product output increased by 50%
 - Spearheaded campaign to increase efficiency--led tiger team credited with saving \$22K in one quarter
- Excelled at the intricacies of balancing \$20M supply account while reducing on-hand inventory by 20%
 - Personal involvement the key to leading his team in eliminating more than 14,000 over-stocked items
- Selected as division's SNCO of the Quarter, first quarter 2000--impact on the mission was key to success
- #2 of 20 SNCOs 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 their 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

VII. INDORSER'S COMMENTS

- Superb results are his hallmark--keen insight into key processes saved Air Force \$60K in contractor costs
- Stellar performer and manager--led division's multi-million dollar inventory reduction effort--results-driven
 - Instrumental in bringing the division into compliance with Congressionally-mandated cost guidelines
- Key contributor in division's Hammer Award for Reinventing the Government--suggestions right on track
- 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 their level
- Big awards above unit level
- Don't use community involvement or education in this section

EPR SAMPLES - TSgt and Below (AF IMT 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 IMT 707A - Field Grade Officer Performance Report, and 707B - Company Grade Officer Performance Report) and the Performance Feedback Worksheet (AF IMT 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. 4 & 5 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 or school attendance, to justify awards and decorations or make other management decisions.

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.

Stratification in OPRs is the most powerful tool to highlight your top performers -- "#2 of 42 in squadron"

PME Recommendation -- omitting this sends a message, make sure it's the message you want to send -- "Must select for SDE in-residence"

Assignment Recommendation -- Another important statement -- "Group Command position an absolute must"

Preparing OPRs

For **Annual OPRs**, units receive the OPR Notice or Shell from Personnel Concept (PC) III approximately 60 days before close-out date. However, you cannot expect this much lead-time in OPR taskings generated by changes of reporting officials (CROs) and for promotion boards. It is the rater's responsibility to ensure the OPRs for their personnel are prepared in a timely manner, even if they have not received a formal OPR shell to prepare the report.

Change of Reporting Official (CRO) reports are prepared IAW Table 3.4 when either the ratee or rater changes.

A **Headquarters Air Force (HAF)-Directed OPR** is the type of report primarily completed for promotion boards. These reports are due at HQ ARPC 45 days prior to board convening date. The requirement for this type of report will be noted in the board convening notice.

A **Commander-Directed OPR** may be completed when an officer has performed in an unsatisfactory or marginal manner. There is no minimum number of days supervision.

A **Referral OPR** contains one of the following: (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 refers to behavior incompatible with minimum standards of personal conduct, character, integrity, or misrepresentation of facts in official statements or documents, serious mismanagement of personal or government affairs, 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 IDE." (Appropriate PME progression; may also state specific PME course , i.e. ACSC)
- "Make him an Ops Group Commander." (On a LTC OPR)
- "After SDE assign to Air Staff." (Appropriate PME with follow-on assignment)

Some **unacceptable** examples are:

- “Make Lt ____ an MSS Commander.” (Inappropriate next level of progression)
- “Send Capt ____ to IDE after selection to Major.” (Reference to IDE is appropriate, but cannot imply promotion by saying “After selection to Major”)
- “Senior Developmental Education or SDE 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 IAW AFI 36-2406, Table 2.1. 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 IMT 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. Colonels are only required an initial feedback.

OPR SAMPLE COMMENTS

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

- 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

VI. RATER OVERALL ASSESSMENT

- Division's #1 of fifteen handpicked 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 IDE in-residence then on to squadron command

- 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--directorates 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 IDE in-res

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

SECTION D

PROMOTION RECOMMENDATION FORM

This section provides guidance for processing the Promotion Recommendation Form (PRF) (AF IMT 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
- Describe key performance factors from the officer's entire career, not just recent performance
- Consider including comments related to behavior or performance which resulted in an Article 15, letter of reprimand, admonishment, or counseling. Court-martial convictions are mandatory comments in the PRF
- Review AFI 36-2406 and pages 4 and 11 of this guide for comments which are inappropriate or prohibited

Writing Tips

- Stratify in PRFs – “my #3 of 42 field graders” ... to highlight and identify your top performers
- Use hard-hitting facts, then quote from previous OPRs ... e.g. succeeded where others failed--“saved \$100K”
- Always use #1 not “number one”
- Use quotes from chain of command...e.g. LG/CC says “easily top 1% of all LG majors”
- Avoid vague comments in PRF
- Abbreviate where you can as long as it's understandable by all ... e.g. ofcr, ldr, sq, flt, grp, CGOQX3, \$12M, etc
- Very important to include individual awards ...e.g. Leo Marquez, FGO yr, etc.
- Recommend appropriate level PME

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.

PRF SAMPLE COMMENTS

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

- General overview of what goes in the block

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
- Handpicked 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 IDE, ops command

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

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 multimillion dollar contract--ensured extra dollars for programs
- Solid gold performer--one of my best--squadron commander in the making--a must promote

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

SECTION E

REFERENCE MATERIAL

ACTION VERBS

Acquired	Converted	Established	Investigated	Procured	Revised
Activated	Corrected	Estimated	Launched	Produced	Revitalized
Administered	Controlled	Executed	Led	Programmed	Saved
Advised	Created	Expanded	Liquidated	Proved	Scheduled
Analyzed	Cultivated	Expedited	Localized	Promoted	Selected
Anticipated	Counseled	Extracted	Located	Provided	Settled
Appointed	Decreased	Forecasted	Maintained	Published	Simplified
Appraised	Decentralized	Formed	Managed	Purchased	Sold
Approved	Defined	Framed	Marketed	Recommended	Solved
Arranged	Demonstrated	Hired	Minimized	Recruited	Standardized
Assessed	Designed	Improved	Modernized	Redesigned	Stimulated
Audited	Determined	Increased	Monitored	Reduced	Studied
Augmented	Developed	Initiated	Negotiated	Rejected	Supervised
Averted	Devised	Instigated	Obtained	Regulated	Supported
Avoided	Documented	Inspected	Operated	Related	Taught
Bought	Doubled	Instructed	Original	Renegotiated	Terminated
Built	Edited	Interpreted	Performed	Reorganized	Tested
Captured	Employed	Interviewed	Pioneered	Reported	Tightened
Centralized	Enforced	Introduced	Planned	Researched	Traded
Conceived	Ensured	Invented	Prevented	Resolved	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 (Do not need to spelled out)

ACC	Air Combat Command	MPF	Military Personnel Flight
AEF	Air Expeditionary Force	NAF	Numbered Air Force
AETC	Air Education and Training Command	NATO	North Atlantic Treaty Alliance
AF	Air Force	NCO	Noncommissioned Officer
AFI	Air Force Instruction	NCOA	Noncommissioned Officer Academy
AFMC	Air Force Materiel Command	OJT	On-the-Job Training
AFPC	Air Force Personnel Center	OPR	Officer Performance Report
AFR	Air Force Reserve	OPSEC	Operations Security
AFRC	Air Force Reserve Command	OSD	Office of the Secretary of Defense
AFROTC	Air Force Reserve Officer Training Corps	PACAF	Pacific Air Forces
AFSC	Air Force Specialty Code	PCA	Permanent Change of Assignment
AFSOC	Air Force Special Operations Command	PC-III	Personnel Concepts III
AFSPC	Air Force Space Command	PCS	Permanent Change of Station
AMC	Air Mobility Command	PFE	Promotion Fitness Examination
ANG	Air National Guard	PME	Professional Military Education
ARPC	Air Reserve Personnel Center	PRP	Personnel Reliability Program
BPZ	Below Promotion Zone	RC	Reserve Component
BTZ	Below The Zone	RNLTD	Report No Later Than Date
CCAF	Community College of the Air Force	SAC	Strategic Air Command
CJCS	Chairman, Joint Chiefs of Staff	SAF	Air Force Secretariat
COMSEC	Communications Security	SDE	Senior Developmental Education
CONUS	Continental United States	SECAF	Secretary of the Air Force
DoD	Department of Defense	SECDEF	Secretary of Defense
DRU	Direct Reporting Unit	SNCO	Senior Noncommissioned Officer
EPR	Enlisted Performance Report	SNCOA	Senior NCO Academy
FOA	Field Operating Agency	STEP	Stripes for Exceptional Performers
FOIA	Freedom of Information Act	TDY	Temporary Duty
FOUO	For Official Use Only	UCMJ	Uniform Code of Military Justice
IG	Inspector General	UIF	Unfavorable Information File
IDE	Intermediate Developmental Education	US	United States
JCS	Joint Chiefs of Staff	USAF	United States Air Force
JFC	Joint Forces Commander	USAFA	United States Air Force Academy
JTF	Joint Task Force	USAFE	United States Air Forces in Europe
MAJCOM	Major Command	WAPS	Weighted Airman Promotion System