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JUNIOR ENLISTED COUNSELING SUPPORT

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JUNIOR ENLISTED COUNSELING SUPPORT

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INTRODUCTION

Performance counseling is the process leaders and followers use to review subordinates' demonstrated performance and potential. Army Techniques Publication (ATP) 6-22.1, *The Counseling Process*, describes different types of counseling (such as initial counseling, event counseling, and performance counseling) and gives instructions on a general process to use for counseling. Performance counseling is the review of a subordinate's duty performance during a specified period. The leader and the subordinate jointly establish performance objectives and standards for current duties of the subordinate. Performance counseling covers the subordinate's strengths, areas to improve, and potential with respect to current duty objectives. Professional growth counseling focuses on development for future positions and duties representing increased responsibilities. Growth counseling, the leader and subordinate conduct a review to identify and discuss the subordinate's strengths and weaknesses and create an individual development plan that builds upon those strengths and compensates for (or eliminates) shortcomings anticipated against requirements of advanced positions or duties.

Performance and professional growth counseling are required for all Army personnel (see AR 623-3 or AR 690-400 for specifics), yet a 2015 Department of the Army Inspector General report points out the lack of counseling across all ranks (Inspection No. 2015-01, 2015). Each year the Center for Army Leadership (CAL) Annual Survey of Army Leadership (CASAL) provides self-reports of the frequency and effectiveness of counseling (Riley et al., 2009, 2012, 2013, 2014, 2015). CASAL findings show that some leaders report not receiving any performance or professional growth counseling, and others who do receive it rate it as not having much impact.

Reasons given for infrequent and ineffective counseling center on the low priority placed on counseling, lack of time to counsel, and lack of experience and know-how by leaders. A lack of experience and know-how with counseling could stem from would-be counselors not having prior exposure to counseling themselves. This study explores methods to help enhance the quality and frequency of counseling provided to junior enlisted Soldiers. Specifically, this study addresses two obstacles to counseling: a skill deficit (e.g. lack of knowledge on counseling) and individual motivation.

Current efforts focus on improving counseling of junior enlisted Soldiers. Junior enlisted Soldiers (E1-E4) comprise 45% of the Active Duty Army (Defense Manpower Data Center, 2017). Junior enlisted counseling is of great importance as initial exposure to counseling at the junior ranks forms expectations for how they in turn counsel others when they are promoted to serve as NCOs. Further, research suggests that junior enlisted Soldiers would benefit from receiving more counseling. The 2013 CASAL reported that 37% of Active Component E4s were dissatisfied or very dissatisfied with their career to date. Only 59% thought that their immediate superior was effective or very effective at developing subordinates, 18% were neutral, and 23% rated their immediate superior as ineffective.

Within the Army, counseling for junior enlisted Soldiers has an additional challenge because it is not tied to a formal performance appraisal system as exists for higher-ranking Soldiers and all Army Civilians. For instance, other cohorts have standard evaluation systems like the Noncommissioned Officer Evaluation Report (NCOER), Officer Evaluation Report, and the Total Army Performance Evaluation System (TAPES) or Defense Performance Management and Appraisal Program (DPMAP) for Army Civilians. All of these require performance counseling. Junior enlisted Soldiers are supposed to receive initial counseling from their supervisor to establish duty requirements and expectations. Beyond that, commanders set local policy on how often performance counseling should occur following the initial session (per AR 600-20). Army regulation only requires reviews to be conducted on a quarterly basis for junior enlisted Soldiers who are promotion eligible and if the Soldier was previously not recommended for promotion (AR 600-8-19). Promotions are automatic to Private E2, Private First Class, or Specialist with specific time in service and time in grade criteria unless the commander elects not to promote (AR 600-8-19, para 2-3). By regulation, performance counseling for Soldiers in pay grades E1-E4 is only required when the Soldier is held back from promotion.

Background

In May 2015, LTG Brown, then Commanding General of the U. S. Army Combined Arms Center, directed CAL to conduct a pilot to improve junior enlisted counseling. The effort sought to assess if any of the following improved the frequency and effects of counseling: (1) a proposed rating tool and counseling approach, known as WholeSoldier, (2) an alternative counseling tool aligned to Army counseling doctrine, and (3) an instructional/motivational video. Assessments were to consider how much NCOs accepted the tools and wanted to continue using them.

LTG Brown's interest in junior enlisted counseling stemmed from the WholeSoldier project, which focused on performance counseling. The WholeSoldier approach was the result of research to differentiate Soldiers on four dimensions: performance, moral, cognitive, and physical (Dees, Nestler, & Kewley, 2013). The WholeSoldier approach fell out of favor as details emerged from reviews of available documentation and face-to-face discussions with its developer. The major criticisms were: a) there was no doctrinal basis for the assessment model, b) the process was resource-intensive, requiring a panel of all unit NCOs to provide an order of merit list of junior enlisted Soldiers, and c) there was no evidence of reliability or validity to the measurement aspects of the tool.

Army experts on personnel measurement criticized the set of requirements and the scheme used to guide ratings. An Army Research Institute (ARI) memorandum, dated 19 June 2015, stated in part, "ARI recommends the Whole Soldier Performance Counseling Form should not be adopted by the Army as a formal counseling instrument or an assessment tool for making personnel decisions. The instrument does not meet industry or scientific standards for demonstrating the measure is reliable and valid for its intended purpose(s). Additionally, existing statistical evidence argues against the validity of the measure."

Despite the inadequacy of the WholeSoldier prototype, it did raise an important question about counseling junior enlisted Soldiers: what dimensions and topics should be discussed with junior enlisted Soldiers to aid their development? The junior enlisted counseling card discussed next sought to define those dimensions and topics.

JUNIOR ENLISTED COUNSELING TOOLS

To address known deficits in counseling junior enlisted Soldiers, two tools were developed and tested by a team of scientists from the Leadership Research, Assessment, and Doctrine Division at CAL. Both tools seek to reduce obstacles to counseling by imparting knowledge on the counseling process. The target audience for use of the tools is junior NCOs. The intent is to benefit

junior enlisted Soldiers so they receive a better counseling experience or will receive counseling they might not have received if the tools did not exist.

At the core of the development process is the Army's concept of leadership, defined in ADRP 6-22 (Department of the Army, 2012). Army doctrine defines leadership activities that align with three basic goals: to lead others, to develop the organization and its individual members, and to accomplish the mission (i.e. leads, develops, and achieves). These goals are extensions of the Army's strategic goal of remaining relevant and ready through effective leadership. The Army's leadership requirements model (LRM) establishes the attributes and competencies Army leaders develop to meet these goals. Army doctrine (ADRP 6-22) and the LRM were used as guides for the development of both tools used in this study.

Fundamentals of performance improvement are based on the ideas of accurate feedback and getting buy-in to the feedback by the individual (Gregory & Levy, 2015). The counseling tools used these two principles as a basis in design.

Counseling Card Design

Since there is no formal evaluation system or tool for junior enlisted Soldiers, there is no universal set of requirements or performance dimensions to use in reviewing performance during counseling. One feature of a counseling tool is a standard list of duties and characteristics applicable to all Soldiers. One possible source for a list was the Army's leadership requirements model, which describes the desired leader attributes and leadership competencies for all Army leaders. While junior enlisted Soldiers are expected to demonstrate potential for leadership, they are primarily responsible for duties aligned with their military occupational specialty (MOS) and not leadership. The LRM was considered to be an incomplete—if not unfair—set of requirements.

To identify an appropriate list of counseling topics for junior enlisted Soldiers, CAL located prior ARI research, which developed a set of performance categories covering primary responsibilities of junior enlisted Soldiers (Knapp, Owens, & Allen, 2012). Prior ARI research also developed and validated a performance rating scale for enlisted Soldiers intending it to be a flexible, brief, and easy-to-understand way for raters to provide performance feedback to subordinates (Moriarty, Campbell, Heffner, & Knapp, 2009). Relying heavily on information from NCO counseling forms (DA FORM 2166-8-1), the ARI tool provides a method for raters to assess a subordinate's leadership competencies (see Table 1 below) as well as proficiency at technical tasks related to their MOS. Constructs from the recently revised NCOER (DA FORM 2166-9 series) were also integrated into the performance dimensions to help further focus the direction of the counseling session for the NCOs to conduct the counseling.

Senior NCOs reviewed the proposed dimensions for the junior enlisted counseling tool to assess the criticality of each dimension and any necessary additions or revisions to the specific behaviors. Table 1 reflects the final dimensions used in the junior enlisted counseling tool; the detailed tool can be found in Appendix B. The final junior enlisted counseling tool is intended to help raters prepare for counseling sessions by providing reminders of key performance areas and ways to organize counseling discussions. These reminders are intended to help the rater reflect on key aspects of the Soldier's core responsibilities in their job as well as their strengths and developmental needs. The sergeant conducting counseling can use the counseling tool to assess the subordinate Soldier's performance and guide the counseling discussion about items important to the Soldier and unit. Table 1: Alignment of Performance Dimensions on the Junior Enlisted Counseling Tool

ADRP 6-22 Leader Requirements Model	ARI Validated rating scale of Enlisted Performance	NCOER 2015	Proposed Junior Enlisted Performance Dimensions
Character: Army values, discipline	Effort & discipline	Army values, responsibility	Effort & discipline
Presence: military bearing, fitness	Physical fitness & bearing	Physical fitness & Military bearing	Physical fitness & bearing
Intellect: expertise - technical knowledge	MOS qualification & knowledge	Competence: technical	Technical competence
Intellect: expertise - tactical knowledge	Warrior tasks & battle drills	Competence: tactical	Tactical competence
Leads: Communicates	None	None	Communication
Develops: Creates a positive environment, teambuilding	Working with others	Training	Teamwork
Leads: Leads by example	Peer leadership	Leadership	Leadership potential

Performance Counseling Video Design

A video was designed to provide the essential aspects about what performance counseling achieves and how it is done, so anyone can counsel. The video, produced using white-board animation technology and titled "Counsel Like a Coach", was less than 5 minutes in length. It conveyed a simple concept for what constitutes counseling in accordance with Army doctrine (ATP 6-22.1) and the benefits it offers to the counselor and the Soldier. The video was designed to be informative and motivational, using ideas to simplify what counseling involves and presenting hooks to everyday events intended to make them relatable and easy to remember. Sample video scenes are shown below.





Assessment Plan

The concept for the assessment of the tools was a dynamic, evolving process. Initially the plan involved mandatory use of counseling tools within one or more brigades. There was a plan to test four different conditions: 1) WholeSoldier, 2) a counseling card, 3) a video, and 4) a control group assessed using the prevailing practice in the unit. The main advantage that the WholeSoldier concept offered was a common framework for evaluating junior enlisted Soldiers. Instead of adopting the WholeSoldier framework—because of criticisms it received—CAL created a new framework based on performance dimensions derived from ARI's work to validate junior Soldier MOS duties (Moriarty et al., 2009).

When concerns with WholeSoldier arose, CAL decided to eliminate WholeSoldier as a test condition and to obtain feedback on the other two tools. To ensure there was merit in the two new tools, focus groups were conducted prior to field trials. CAL scientists facilitated the focus groups and a standard set of questions was used. During the first round of focus groups, the counseling card and video were shown and NCOs were asked for their projection of how useful the tools would be. Four focus groups were conducted with students attending the Basic Leader Course (BLC) and the Advanced Leader Course at Fort Benning. Three sergeants first class, 21 sergeants, and 28 sergeants participated.

Based on feedback, changes were made prior to taking the tools to Fort Carson for trials. The counseling card was modified slightly based on suggested improvements and plans to use the video were dropped based on the negative feedback received. CAL created a briefing for senior NCOs to explain the intent and use of the counseling tool. The Mission Command Center of Excellence (MCCOE) sergeant major briefed 40 Soldiers from the 4th Infantry Division (ID) Sustainment Brigade. The five slides shown in Appendix A introduced the counseling card to Fort Carson NCOs. A master sergeant from the brigade also briefed the counseling tool to brigade Soldiers. After allowing the unit to use the counseling card over several months, CAL conducted a second phase of focus groups to assess the counseling card. Use of the card was not mandatory. CAL thought adding a requirement would generate negative attitudes. Those who chose to use the card voluntarily would be an indication of how compelling the information was.

FINDINGS

Findings consist of qualitative data collected in two phases of focus groups.

Phase 1. Focus Group Feedback on Anticipated Value

The first phase of focus groups with sergeants, staff sergeants, and sergeants first class provided feedback on the potential impact of two tools on the quality and frequency of junior enlisted performance counseling.

<u>On counseling.</u> The participants did not confirm that a counseling problem exists among junior enlisted Soldiers. Many thought that counseling is being done but is not always recognized by Soldiers as constituting counseling. Some thought that performance counseling for junior enlisted Soldiers makes no difference because promotions occur regardless of performance or problems and that supervisor input into promotion decisions do not carry much weight. On the positive side, participants noted that units that have performance counseling as part of their battle rhythm are noticeably better at completing counseling and achieving quality counseling. Many observed that the different types of counseling should receive more emphasis in Advanced Individual Training.

<u>On the counseling card.</u> The participants reported that the card had merit, that it served as a good discussion starter, and that it was flexible enough to personalize a counseling session and cover items beyond the reminders on the card. They did not anticipate that the card would produce major improvements in counseling frequency or quality. A few thought that it omitted important contexts to prompt discussion about what was happening in a Soldier's personal life for a more holistic perspective on the individual's growth.

<u>On the video.</u> The participants did not like it. They thought that the video did not have the intended motivational or inspirational effect; believed it would have no impact on intended outcomes, and feared it would become mandatory for all sergeants to view.

Phase 2. Focus Group Feedback after Use

Thirty-nine Soldiers from the 4th ID Sustainment Brigade at Fort Carson, CO participated in the phase 2 focus groups. The group included 4 specialists, 4 corporals, and 31 sergeants. Only three from the original 40 who were briefed on the counseling tool participated in the focus groups, and only 11 of the other 37 reported they attended the briefing by the master sergeant responsible for the project at the brigade.

<u>On counseling.</u> The phase 2 focus group had some general insights about Soldier counseling independent of the context of the junior enlisted counseling tool. Most believed that they were either not taught or only informally taught how to counsel, or that the instruction was not adequate or provided at the wrong time. Most felt that counseling carries a negative connotation, that positive counseling is not done frequently enough, and junior Soldiers do not always recognize when informal counseling occurs. There was agreement that counseling as currently conducted does not meet its intended purpose. They felt that monthly required counseling is too frequent and that quarterly counseling is sufficient. The primary barrier to counseling cited by participants was time. A second barrier was infrequent opportunities to observe a given Soldier in a month and a third was the large number of Soldiers that fell under the NCO's span of responsibility. One NCO reported he had 13 Soldiers to counsel and the bulk of his time was spent on event

counseling—dealing with Soldiers' problems, rather than counseling his good performers on what to sustain and how they could improve.

<u>On use of the counseling card.</u> The 39 focus group participants indicated that they received a copy of the counseling tool via email, but some were not fully aware of the purpose of the tool. Five NCOs reported using the tool in counseling their junior enlisted Soldiers. Feedback on the counseling tool may have been more positive if more of the NCOs were made aware of its purpose and it received more consistent leadership support in the unit.

<u>On utility of the counseling card.</u> The majority of focus group participants felt the counseling tool would facilitate better counseling, contribute to improved counseling statements, and would save time preparing and conducting counseling. Many participants thought that the card would be an appropriate reminder of what should be considered for counseling, including some emphasis on leadership potential. Most thought the tool was a good starting point to begin preparations for counseling. Most felt that it provided the right level of guidance as a template and would not lead to "cookie cutter" counseling or counseling statements, though some mentioned this issue as a potential concern. Most liked the fluid nature of the card and the advice to customize what is covered from the card to each counseling session. The focus group participants saw value in having a flexible tool contributing to consistency in how counseling is conducted in the Army.

One NCO commented on the comprehensive coverage of the card, "This covers every aspect you need in order to have a firm grasp on how to do well in the military." Many recognized that the tool prompted too many topics to cover in one counseling session, although different topics could be chosen for a specific session or allocated across multiple sessions.

An NCO new to the brigade appreciated what the card offered, "I'm glad I got this. This is my first month writing monthly counselings and this is very helpful."

<u>On introducing the counseling card.</u> Some suggested that introducing the card to NCOs at BLC would be helpful along with improving that segment of counseling training at BLC and other NCO courses. Many Soldiers felt this would be helpful to introduce at the E4 level (for those with time in grade or promotable). Increasing the awareness, presence, importance, and substance of counseling through education for all Soldiers was encouraged (e.g., this would help junior Soldiers recognize when they are counseled).

Expanding the audience for the card. Many participants commented that they wished their superiors had something like it when they were junior enlisted Soldiers or that their current superiors would use it because it represented how they would have liked to be counseled. Many thought that the use of such a tool required support from higher up and emphasis on it should come from "the top down."

Expanding the purpose of the card. Some participants felt the tool could be useful as an after counseling review, to explore how well counseling was conducted and to set goals to improve subsequent counseling. Others saw it especially useful for initial counseling sessions because it provides coverage for everything that should be addressed. Some indicated that they would share the card with their subordinates so they would know what they would be counseled on allowing subordinates to prepare accordingly.

<u>On implementation:</u> The majority of focus group participants felt the tool should remain optional to use, though a few thought that NCOs who struggle with counseling could be directed to use it by their rater. Many thought that this would be an important addition to their green notebooks, to

help create a disciplined approach to counseling and a way to record notes about a Soldier for future reference. Many also mentioned having the card in a mobile application format (like a mobile phone app) would allow them to take notes on the go, as they observe each Soldier. They did not think that confidentiality and personal identifying information would be negative issues to interfere with a mobile application.

RECOMMENDATIONS

The focus group NCOs judged the junior enlisted counseling tool as a helpful guide to prepare and conduct performance counseling. The dimensions or factors of performance were viewed as complete and capable of customized application. The instructions and questions provided helped new and seasoned counselors alike. The NCOs liked the tool because it is not mandatory and not a report to be completed and filed.

The junior enlisted counseling tool should be published as a graphic training aid (GTA) and serve as a job aid for any NCO responsible for counseling. Additionally, the GTA should be discussed in NCO courses as a resource and supplement to core curriculum on counseling.

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APPENDIX A

INTRODUCTION TO THE JUNIOR ENLISTED COUNSELING CARD



JUNIOR ENLISTED COUNSELING CARD

		This briefing is: unlimited distribution
	MERICA'S ARMY UR PROFESSION – LIVING THE ARMY ETHIC	Junior Enlisted Counseling Card
	 to fix or improve but also to en Performance counseling is a m 	ot just to bring attention to things courage the good things heans to guide Soldiers and to rough such feedback discussions by are tomorrow's future leaders
p	 irect leaders need to guide rovide feedback Counseling conducted to guide as having a conversation Any important message needs of delivering it 	e development can be as simple
• A	 counseling card is simply a Help leaders focus on core resentisted Soldiers, regardless of Offer questions to think about a and guide the conversation 	ponsibilities expected of all junior f their MOS

AMERICA'S ARMY OUR PROFESSION -	LIVING THE ARMY	ETHI
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Junior Enlisted Counseling Card





Junior Enlisted Counseling Card

What the card is NOT.

- IS NOT REQUIRED
- IS NOT MORE MANDATORY TRAINING
- IS NOT A GUIDE FOR TAKING DISCIPLINARY ACTION
- IS NOT A CHECKLIST FOR EVERYTHING THAT COULD BE COVERED

What the card does.

- Helps overcome obstacles to having performance discussions
 - "We don't know how. Many of us never had a SGT who role modeled positive developmental performance counseling."
 - "We don't know what to cover for developmental/growth counseling."
 - » "We can't find time to prepare."
- Can be used to supplement what your unit requires for counseling
- Identifies a good mix of responsibilities to develop technically and tactically competent Soldiers and to start to prepare them for leadership
- Helps to think about counseling before doing it and makes it easier to conduct and easier to document (if required)



How to use the card

- 1. Scan the core responsibilities and the set of questions
- 2. Have a Soldier in mind & think about the questions for that Soldier
- 3. What duties does the Soldier perform well • Always find something positive to mention
- Select areas where you would like to see improvement
 The Soldier may already be strong in a given responsibility and it would be helpful to get even better
 - $\boldsymbol{\varphi}$. Select only one or two to focus on for improvement
- Meet with the Soldier and have a two-way discussion
 - Engage the Soldier and have him or her take ownership over what he or she does well and what could be improved
 - Avoid intimidating the Soldier during growth counseling.
 - $\bar{\mathbf{o}}$ Make clear shifts to event counseling, if needed, to address discipline or others problems
 - Go to ATP 6-22.1, Counseling Process, for more guidance, if needed
- 6. At the end have the Soldier back-brief you on what he or she heard you say and what he or she should do going forward
- 7. In the next discussion follow-up on progress

The card is just a starting point to trigger your thinking and to use as a guide until counseling becomes second nature. Add to it and adapt it to your needs.

APPENDIX B

FINAL JUNIOR ENLISTED COUNSELING TOOL

