### DEVELOPMENTAL COUNSELING FORM

For use of this form see FM 22-100.

---

**DATA REQUIRED BY THE PRIVACY ACT OF 1974**

 AUTHORITY: 5 USC 301, Departmental Regulations; 10 USC 3013, Secretary of the Army and E.O. 9397 (SSN)

---

**PRINCIPAL PURPOSE:** To assist leaders in conducting and recording counseling data pertaining to subordinates.

**ROUTINE USES:** For subordinate leader development IAW FM 22-100. Leaders should use this form as necessary.

**DISCLOSURE:** Disclosure is voluntary.

---

## PART I - ADMINISTRATIVE DATA

<table>
<thead>
<tr>
<th>Name (Last, First, MI)</th>
<th>Rank / Grade</th>
<th>Social Security No.</th>
<th>Date of Counseling</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Organization</th>
<th>Name and Title of Counselor</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

## PART II - BACKGROUND INFORMATION

**Purpose of Counseling:** (Leader states the reason for the counseling, e.g. Performance/Professional or Event-Oriented counseling and includes the leader’s facts and observations prior to the counseling):

1. The purpose of this counseling session is to discuss your performance and attempt to set some goals.
2. FACTS and OBSERVATIONS
   - Great performance during the past month
   - Needs to establish goals
   - Awarded the APFB badge with a score of 297
   - Qualified Expert with the M4
   - Needs to work on Self Development

Example 1.

The intent here is to provide clarity, be brief, and use this area to provide the Soldier with an idea of where she/he stands in terms of performance. Sentence one describes the purpose of the counseling and sentence number two provides specific facts and observations, both good and bad. This technique may be used with any type of counseling and allows the counseling statement to stand alone. This portion may be filled out prior to the session – you may also add to it as the session develops.

Explanation 1.

---

## PART III - SUMMARY OF COUNSELING

Complete this section during or immediately subsequent to counseling.

**Key Points of Discussion:**

This section develops the counseling and ends in a summary. A common error is filling out this portion out prior to the session – doing this breaks down the communications process. Goal setting is the key to an effective plan of action. A basic outline may be used to guide the session and take notes throughout in order to record and summarize the counseling.

Explanation 2.

---

**Example 2.**

1. Areas of special emphasis
2. Additional duties
3. Standards and expectations
4. Upcoming events – Calendar
5. Promotion requirements
6. Reenlistment Status
7. Goals
   - Goal setting is essential for providing direction and motivation.
   - Most Soldiers need help defining a Specific, attainable, relevant, measurable and track able set of goals. The best plans of actions are linked to the goals in order for the individual to have a buy in.

GOALS

PLAN OF ACTION

The best counseling is done early in the counseling period. The idea is to use the same concept used in the NCOER counseling process. The essence is captured by looking forward into the communication process by providing direction. The method of reliving the past in terms of performance is basically perceived as story telling, things already past where the Soldier and counselor have no control or influence. Provide an assessment and move forward with the counseling.
Plan of Action: (Outlines actions that the subordinate will do after the counseling session to reach the agreed upon goal(s). The actions must be specific enough to modify or maintain the subordinate’s behavior and include a specific time line for implementation and assessment (Part IV below):

Explanation 3.
Specificity, a suspense date, or time line are the key elements here. Guide the Soldier to develop his/her plan of action in order for it to have a personal meaning and impact in his/her ability to follow through and get it done. Plans of actions are more meaningful when tied to personal goals. In some cases, such as retraining the Soldier or instances of poor discipline the plan of action must be directed by the leader without a specific buy-in from the Soldier.

Example 3.
1. Develop a set of goals using the SMART (S = Specific, M= Measurable, A = Attainable, R = Relevant, T = Track able) formula no later than the first week of next month (A date is preferred).
2. Go to the education center and speak with a counselor to determine which degree you wish to pursue and which method is best suited to fit your schedule. Do this no later than the first week of the month (A date is preferred).

Session Closing: (The leader summarizes the key points of the session and checks if the subordinate understands the plan of action. The subordinate agrees/disagrees and provides remarks if appropriate):

Individual counseled: I agree / disagree with the information above

Individual counseled remarks:

Signature of Individual Counseled: _________________________________________ Date: ____________________

Leader Responsibilities: (Leader’s responsibilities in implementing the plan of action):

Explanation and Example 1 - Combined

Signature of Counselor: _________________________________________________ Date: _____________________

PART IV - ASSESSMENT OF THE PLAN OF ACTION

Assessment: (Did the plan of action achieve the desired results? This section is completed by both the leader and the individual counseled and provides useful information for follow-up counseling):

Counselor: ____________________ Individual Counseled: ____________________ Date of Assessment: ____________

Note: Both the counselor and the individual counseled should retain a record of the counseling.