MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 – MANAGE THE PHYSICAL PLANT

WHAT THIS DUTY DOES

The general condition, cleanliness, style, decor, and overall appearance of your facilities, your furniture, fixtures, and equipment (FF&E), and your vehicles is essential to a successful, healthy, enjoyable, and safe MCCS Program. Likewise..., intelligent, efficient, and effective scheduling of your facilities and equipment is paramount to a good Program.

As the Program Manager, you can either:

Be ***PRO-ACTIVE*** and take charge of these conditions, think ahead, minimize environmental and operational problems, and be prepared for contingencies to ensure your facilities and FF&E meet your Program's mission.

- OR -

You can be ***REACTIVE*** by letting the situation, operational, and environmental conditions take charge. In which case you will probably find yourself solving one unnecessary crisis after another while not meeting your Program's goals & objectives, keeping up with your competitors, or most importantly..., meeting your customer's/patron's needs.

Duty 8.0 includes the following guidance:

8.1 Accomplish New Manager Turn-Over Activities.

8.2 Establish & Monitor a Facility/FF&E Maintenance Program.

8.3 Inspect Facility/FF&E.

8.4 Correct Facility/FF&E Discrepancies.

8.5 Ensure Proper Disposal of NAF/APF Property Equipment, and Vehicles.

8.6 Ensure Proper Disposal of Lost/Stolen Property Equipment, or Vehicles.

8.7 Schedule Use of Facilities and MCCS Vehicles.

8.8 Oversee Vehicle Maintenance and Use.

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.1

Accomplish New Manager Turn-Over Activities

DO THIS

TASK WHEN

- You are transferred from one MCCS supervisor/manager position to another that has duties and responsibilities different from your present position/assignment.
- You are newly hired/promoted into an MCCS supervisor/ manager position.
- You are assigned/detailed as temporary/emergency relief into an MCCS supervisor/manager position that has duties and responsibilities different from your current position/assignment.
- You are being relieved by a new supervisor/manager.

REFERENCES

- MCO P1700.27 (series), MCCS Policy Manual.
- MCO P12000.11A, Marine Corps Nonappropriated Fund Personal Policy.
- Local policy directives on personnel management, staffing, indoc, and position management.
- DoDI 7000.14-R, Department of Defense Financial Management Regulations.

SUPPLIES/ RESOURCES

- Up-to-date standard operating procedures (SOPs) relative to your MCCS Program.
- Up-to-date local Command instructions relative to your Program.
- Up-to-date system instructions relative to your Program. (Refer to Task 9.4, Locate, Maintain, Interpret, and Apply Official Policies and Instructions.)
- Applicable keys, passwords, combinations.
- Appropriate letters of authorization.
- Current inventory/list of supplies and equipment.
- Up-to-date position descriptions for your staff.
- Pass-down logs and/or local desk references, if any.
- Time and appointment scheduling tool or similar networking and things-to-do devices/lists/ methods.
- Local area, base, and MCCS Program information packages, flyers, brochures, booklets, etc.
- MWR Division, Training Branch handout, Standards of Conduct.
- Staff payroll data, if your position requires payroll and incentive/bonus management.
- Any contract or excerpts of contracts relative to your new position or area of responsibility.
- Current program activity/event calendar(s).
- Current/recent program needs and competition assessment information/data.

SUPPLIES/ RESOURCES (cont.)

- Copies of staff work schedules.
- Copies/excerpts of local labor agreements, if any.
- Up-to-date customer/patron usage data.
- Financial records for the current period and past two years.
- Up-to-date personnel list.
- Copies of the Command and MCCS Program's mission, vision, goals, and guiding principles, if any.
- Copies of the MCCS Program's short/ long-term plans, if any.
- Recent procurement records.
- Equipment, clothing, identification badges, cards, tags applicable to your position.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- You have completed all the check-in/orientation procedures required by your MCCS Program, Command, and the applicable check-in/orientation steps listed in this task, which include:

  - Getting letters of authority, certifications, and licenses to accomplish the responsibilities of your position.

  - A review of your Program's areas, equipment, and supplies.

  - A review and discussion of the past history of your Program's staff, operations, finances, supplies, equipment, facilities, procedures, activities/events, products/services, projects, and its customers/ patrons.

  - Getting copies of all applicable instructions and SOPs necessary to accomplish the responsibilities of your position.

  - Beginning development of (or addition to) a professional network of on base and off base, points-of-contact (POCs), vendors, peers/colleagues, staff, tutors, and mentors.

  - Discovering what your Program has, where everything is located, what projects are pending, what projects need to be initiated/finished, and what is on order or back-order.

  - Getting a list of the phone numbers and POCs necessary to accomplish the responsibilities of your position.

THIS TASK IS DONE CORRECTLY WHEN (cont.)

- Locating and examining all the hazardous materials (HAZMAT), HAZMAT storage, and the Material Safety Data Sheets (MSDS's) necessary to accomplish the responsibilities of your position.

- Finding the HAZMAT usage and storage to be in compliance with applicable policy and instructions.

- Locating and examining all the fire, safety, security, preventive medicine materials, and storage areas necessary to accomplish the responsibilities of your position. Finding these to be in compliance with applicable policy and instructions.

- Meeting all your staff, your immediate supervisor, the MCCS Director and all key POCs necessary to accomplish the responsibilities of your position.

- Discussing local policies, traditions, histories, and organization culture with your immediate supervisor, the MCCS Director, and your key staff, tutors, and mentor(s).

NOTES

This task is one of acquiring and absorbing a great deal of information in a short period of time.

Hopefully, most of the steps in this task are included in your Command's and the MCCS Program's check-in and indoctrination procedures.

You may be moving up within a Program with which you are completely familiar. If this is the case, review this task to determine if you need to accomplish any of its steps. Disregard any of the check-in and indoctrination items you have already accomplished or are scheduled to accomplish in the near-term.

You will find the first few weeks in a new supervisory/ management position/assignment to be both hectic and confusing, no matter how well organized the Command's/ Department's check-in and indoctrination processes. For sure, this is the time to apply the effective communication imperative: "listen 80% of the time..., then listen the other 20% of the time!" If there is any time left--ASK QUESTIONS. Make sure you are clear on everything.

You will have the entire rest of your time in this position/ assignment to talk..., for now watch, inquire, and listen! Your success is nearly ensured when you transition from listening and learning to participative supervision/management.

An exception is if you have been placed in a bad situation to help salvage the Program, in which case, listen quickly, then get on with the business at hand! If you are in this situation, you were undoubtedly selected for your skill, knowledge, and experience.

During this initial check-in and indoctrination period you will be swamped with details. See Task 4.4, Manage Your Time and Things-To-Do.

NOTES (cont.)

The check list in this task may seem a bit overwhelming, but remember, accomplish these over-time--it's in your best interest to balance *speed* with *quality*. (E.g., 30-60 days is a reasonable goal--3-days isn't!)

You may want to cover everything, and probably should; just do it well. And a final suggestion..., cover these items when you need them vice all at once or in the order provided in the checklist!

Whenever possible, accomplish these steps with the incumbent supervisor/manager!

If it is you who is being relieved and if you have the good fortune of having "overlap" time, use this Task to assist your relief in an efficient and thorough turn-over.

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PROCEDURE

Step 1 Complete all applicable check-in procedures specified by the following.

- ☐ Your immediate supervisor.
- ☐ The MCCS Director/Deputy/AC/S.
- ☐ MCCS or Human Resources Office (HRO).
- ☐ The Command, if applicable.

Step 2 If you are new to the area/Command, accomplish your personal needs as you begin your new position/assignment turn-over steps.

These may include:

- Moving.
- Locating temporary or permanent housing.
- Receiving delivery of personal property into a new residence.
- Scheduling electrical, water, and sewage hook-ups.
- Starting trash, garbage, and recycling collection.
- Starting mail, e-mail/internet connections, and changing addresses.
- Starting newspaper(s), magazines, and cable TV service.
- Arranging child care.
- Accomplishing school registrations/transfers.
- Taking care of house/yard care/maintenance/renovation.
- Transferring church membership records.
- Transferring fraternal organization membership records.
- Accommodating special medical requirements.
- Locating veterinary care facilities.
- Locating shopping facilities.
- Establishing new physician and dental care providers.
- Establishing new banking and investment services.
- Establishing new legal, financial, and insurance services.
- Establishing new personal services, (gym, hair care, car care, etc.).
- Identifying recreation and leisure opportunities.
- Accommodating new/different transportation needs.
- Changing driver’s licenses, vehicle/boat/plane registrations/tags.
- Changing vehicle, boat, trailer, airplane titles.
- Registering to vote.
- Obtaining applicable business licenses.

Step 3 Accomplish the following turn-over activities that you have **NOT** already accomplished (or are scheduled to accomplish) by Step 1.

This check list continues on following pages.

NEW MCCS PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST
ACCESS & AUTHORITY
☐ Do you have necessary keys and/or lock combinations to access all areas necessary to accomplish the responsibilities of your position?
☐ Do you have passwords to access your authorized computer system(s) or system areas?
☐ Have you changed the initial "start-up/log-in" password to one only you know? Be sure to comply with local ADP/security guidance regarding use of computer systems, networks, e-mail, and computer peripherals.
☐ Do you have personal copies of the MCCS SOPs necessary to accomplish the responsibilities of your position?
☐ Do you have letters of authorization necessary to accomplish the responsibilities of your position?
PERSONNEL
☐ If required by your position, have you been processed for or have an up-to-date health card?
☐ If required by your position, have you been processed for or have an up-to-date National Agency or other security check?
☐ If required by the base or MCCS, do you have an up-to-date ID Card?
☐ If required by the base or MCCS, do you have up-to-date base vehicle stickers for each vehicle you and your family use on the base?
☐ Do you have an up-to-date list of personnel?
☐ Do you have an Individual Development Plan (IDP) / Learning Plan?
☐ Have you been briefed and provided written guidance explaining how to conduct recruitment for new/replacement MCCS staff? How and when to prepare and submit SF-52's or local forms? How and when to announce/advertise and interview? How selected and non-selected applicants are notified? How widely or restricted your typical announcements are disseminated and by what media? (See Task 6.3, Announce/Fill NAF Position Vacancies.)

Continued on next page.

Step 3 (cont.)

NEW MCCS PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

PERSONNEL (cont.)

- ☐ Have you received all applicable special equipment, clothing, identification badges, cards, tags applicable to your position.
- ☐ Have you reviewed your staff's personnel and training records?
- ☐ Have you received a list of authorized and vacant APF and NAF billets?

ORGANIZATIONAL CHECK-IN ITEMS

- ☐ Have you met and received initial briefings from:
  - ☐ Your immediate supervisor?
  - ☐ MCCS Director?
  - ☐ MCCS Deputy, if any?
  - ☐ Command Sergeant Major?
  - ☐ Executive Officer (XO)?
  - ☐ Commanding Officer (CO)?
  - ☐ Base or MCCS Maintenance?
  - ☐ Others as specified by your immediate supervisor?

  (ASAP--meet, greet and get acquainted with your staff! See Step 12.)
- ☐ Have you toured the base, and your MCCS Program facilities?
- ☐ Have you participated in a briefing about the overall vision, mission, and guiding principles of the MCCS Program, and your program?
- ☐ Do you have a copy of the MCCS Program and your Program's goals and objectives and short/long-range plans?
- ☐ Do you have a copy of the MCCS Program and your Program's organization charts?
- ☐ Have you received a general briefing of DO's and DON'Ts from your immediate supervisor, the MCCS Director, and your colleagues and peers?
- ☐ Have you received an overview briefing of the MCCS Program's history, staff structure and Program organization from your immediate supervisor and/or the MCCS Director?
- ☐ Do you have a copy/copies of the base, MCCS Program, and Program phone and address lists?
- ☐ If you will be an authorized purchasing agent, have you received contracting training and contracting warrant?

Continued on next page.

Step 3 (cont.)

NEW MCCS PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

ORGANIZATIONAL CHECK-IN ITEMS (cont.)

- ☐ If you will be an authorized NAF purchase card user, have you received NAF Purchase Card training, a copy of the purchase card SOP, and your NAF purchase card?
- ☐ Have you received a briefing of the MCCS Program's contract services from your immediate supervisor and/or the MCCS Director?
  - Maintenance
  - Janitorial
  - Other
- ☐ Do you have copies of, or access to all base and higher authority instructions necessary to accomplish the responsibilities of your position? (See Task 9.4.)
- ☐ Have you completed a site inspection and signed for all your Program's spaces, equipment, FF&E, machinery, vehicles and minor property with your immediate supervisor and applicable Program/department staff members? Have you conducted both a NAF fixed asset inventory and an APF property inventory?
- ☐ Have you completed a physical (item-by-item) inventory and signed for of all your resale and program supplies, and minor property with your immediate supervisor and applicable Program/department staff members?
- ☐ Have you worked with your immediate supervisor and others as applicable to investigate, analyze and report significant discrepancies in any of these turn-over inventories? (Refer to Task 8.5, Ensure Proper Disposal of NAF/APF Property, Equipment and Vehicles and Task 8.6, Ensure Proper Disposal of Lost/Stolen Property, Equipment, or Vehicles.
- ☐ Have you ensured that the subsidiary ledgers are reconciled to the General Ledger account balances (or your Property & Depreciation Records/system print-outs)?
- ☐ Have you verified and signed for the petty cash and change funds?
- ☐ Have you completed, signed, and returned a Financial Disclosure Statement applicable to your position?
- ☐ Have you received a list of accounts receivable for your Program as of the close of the most recent financial period, indicating status of action being taken to collect receivables more than two months old?
- ☐ Have you reviewed any vendor/payment disputes/disagreements?
- ☐ Have you reviewed the list and status of pending maintenance/works requests?
- ☐ Have you reviewed the list, status, and documentation of pending, major and minor construction projects?

Continued on next page.

Step 3 (cont.)

NEW MCCS PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

ORGANIZATIONAL CHECK-IN ITEMS (cont.)

- ☐ Have you received "the word" and investigated any unmet promises that have been made to your customers/patrons and/or staff members?
- ☐ Do you have copies of the most recent month financial statements with copies of the same month last year?
- ☐ Do you have documentation of the proposed capital improvement plans?

STANDARDIZED PROCEDURES

- ☐ Have you received a complete demonstration, briefing and check-out/certification on each of the following procedures that are relative to the responsibilities of your position?
  - ☐ Opening/closing.
  - ☐ Point-of-sale system.
  - ☐ Cash registers.
  - ☐ Communication systems. (Mail, e-mail, phones, fax, etc.)
  - ☐ Budget.
  - ☐ Financial statement.
  - ☐ Safety/sanitation.
  - ☐ Payroll:
    - Time/attendance and time cards (system).
    - Work schedules and scheduling history.
    - Staff member meals.
    - Tips.
  - ☐ Tickets, coupons, and refunds.
  - ☐ Credit cards.
  - ☐ Security:
    - Alarm procedures.
    - Facility closing.
  - ☐ Use of facilities/equipment/vehicles.
  - ☐ Fees, prices and charges.
  - ☐ Purchase requests and purchase orders (POs).
  - ☐ Petty cash and change funds.
  - ☐ Interdepartmental transfers/charges.
  - ☐ SOPs and station Instructions.
  - ☐ Pass-down log.
  - ☐ Procedures for requesting assistance/work from support services and other MCCS Programs.
  - ☐ Procedures for requesting assistance/work from other on-base and off-base Departments.
  - ☐ HAZMAT and operational safety.
  - ☐ Local forms.
  - ☐ Internal controls.
  - ☐ Disaster and emergency procedures and phone numbers. (E.g., robbery, assault, fire, hurricane/tornado, snow/ice, injury, death, etc.)

Continued on next page.

Step 3 (cont.)

NEW MCCS PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

MISCELLANEOUS

- ☐ Do you a have list of POCs and an up-to-date re-call/on-call list necessary to accomplish the responsibilities of your position?
- ☐ Have you been made aware of your "challenging" staff members as well as your "shining stars"?
- ☐ Do you have a list and status of taskings from the Commanding Officer or Executive Officer (or higher) that have not yet come to closure.
- ☐ Do you have a list of "hot button" issues or "pet" programs of interest to local Marine Corps management?
- ☐ Do you have a list of the MCCS Program's vehicles, their condition, where they are, who they are assigned to, and how they are checked out?
- ☐ Do you have copies of local forms necessary to accomplish the responsibilities of your position?
- ☐ Do you have copies of local labor agreements relative to your position and those that apply to your staff?
- ☐ Do you have copies of up-to-date position descriptions (PDs) for each of your staff members?
- ☐ Do you have a time and appointment scheduling tool or similar networking and things-to-do devices/lists/methods?
- ☐ Do you have copies of or access to the pass-down logs and/or local desk references, if any.
- ☐ Do you have copies of up-to-date supplies and equipment lists/inventories?
- ☐ Do you have copies of or access to:
  - ☐ Past staff work schedules
  - ☐ Staff payroll data, if your position requires payroll and incentive/bonus management.
  - ☐ Current program activity/event calendar(s).
  - ☐ Current/recent program needs and competition assessment information/data.
  - ☐ Customer/patron usage data.
  - ☐ Financial records for the current period and past two years.
  - ☐ Recent procurement records.
  - ☐ Latest audit reports.
  - ☐ Latest minutes from associated groups (e.g., advisory board, QOL board, special interest groups, etc.).

Continued on next page.

Step 3 (cont.)

NEW MCCS PROGRAM SUPERVISOR/MANAGER TURN-OVER CHECK LIST

MISCELLANEOUS (cont.)

- ☐ Program evaluations.
- ☐ Detailed activity plans and after-action reports, and lessons-learned files.
- ☐ Results of zone inspections.
- ☐ Pending discrepancies.
- ☐ Open purchase orders/obligated funds.

☐ Do you have the office supplies and equipment necessary to accomplish the responsibilities of your position?

☐ Have you reviewed the Utilization Funding and Management (UFM) practices and memorandum of understanding (MOU)?

TRAINING/CAREER DEVELOPMENT

☐ Have you received training (or are you scheduled to receive) training, demonstrations, briefings, and/or check-out/certification on the following?

- ☐ Command/MCCS orientation.
- ☐ The filing system(s) used by your Program.
- ☐ Training and developing staff members.
- ☐ Program safety, sanitation and health risks.
- ☐ Discipline.
- ☐ C.A.R.E training, if applicable to your position.
- ☐ E-mail, intranet, internet, and fax operations.
- ☐ Equal Employment Opportunities (EEO), affirmative action, and ADA requirements.
- ☐ Sexual harassment.
- ☐ Cultural diversity.
- ☐ Standards of conduct and government ethics.
- ☐ Military and business protocol.
- ☐ Cash handling and security.
- ☐ Preparation and routing of Daily Activity Reports (DARs).
- ☐ Computer operations and security.
- ☐ Emergency procedures for your building(s) and area of responsibility.
- ☐ Violence in the workplace.
- ☐ Performance ratings/reviews for NAF and Civil Service staff members.
- ☐ Program specific training (technical and professional).
- ☐ Other. _____

_____

Step 4 At your earliest opportunity, discuss the past history of your Program's staff, operations, finances, supplies, equipment, facilities, procedures, activities/events, products/services, projects, and its customers/patrons with your immediate supervisor and your colleagues.

- What will keep you out of trouble?
- What will make you, your staff, and the Program…, extraordinary?
- Other than the obvious rank-has-its-privileges (RHIP) folks, who are your important customers/patrons?
- Who are your Program's opponents/critics?
- Who are your Program's advocates?
- Who are your principal gatekeepers and stakeholders?
- Are there any pending sensitive issues?
- Any open/pending audit/inspection findings.

Step 5 Get out and about!

☐ Don't wait for the base's major players to come to you. Take every opportunity to get out and meet the people. Meet the Program managers, department heads, Base Sergeant Major, Unit CO, and Single Marine representative, advisory board representatives, special interest group members/advisors, quality of life board members, security, safety, etc. Schmooze!

☐ Listen first! After you hear what their perceptions and opinions about what you are NOT doing/providing or SHOULD be doing/providing, ask each to describe what they value in the Program?

☐ Always under-promise and over-deliver. Record and carry out your promises!

NOTE:	Repeat this process with each member of your staff, your colleagues, and your immediate supervisor.

Step 6 At your earliest opportunity, discuss local policies, traditions, histories, mores, norms, and culture with your immediate supervisor, the MCCS Director, support services, business office, and your key tutors/mentors.

Step 7 At your earliest opportunity, read all applicable instructions and SOPs necessary to accomplish the responsibilities of your position. (See Task 9.4, Locate, Maintain, Interpret, and Apply Official Policies and Instructions.)

Step 8 Prepare and maintain a professional network of on-base and off-base, POCs, vendors, peers/colleagues, staff, tutors, and mentors. (See Task 4.1, Establish and Maintain a Professional Network.)

Step 9 Read and compare your copies of the base, MCCS Program's mission, vision, goals, and guiding principles, your Program's short/long-term plans, and its goals and objectives to ensure these *are* and *remain* aligned. (See Task 2.5, Provide Vision, Mission, Goals, and Objectives.)

Step 10 During the early stages of your turn-over activities, observe what your Program has, where everything is located, what projects are pending, what projects need to be initiated/finished, what is on order or back-order. (See Duty 8.0, Manage The Physical Plant, Duty 7.0, Manage Supplies and Equipment, Task 2.4, Provide Short/Long-Term (5-Year) Program Management Plan Input, and Task 4.4, Manage Your Time and Things-To-Do.)

Step 11 If applicable, locate and examine all the hazardous materials (HAZMAT), the Material Safety Data Sheets (MSDS's), and the HAZMAT storage for your Program.

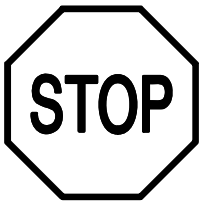
Step 12 Immediately begin getting to know your staff members.

- First and family names.
- Important family dates.
- Interests and hobbies.
- What they find rewarding and satisfying.
- What they most like and dislike about the Program and their job.
- Their background and experience.
- What they see as incentives and motivational.
- Strengths, weaknesses and backgrounds.

Step 13 Accomplish all the above steps with each new staff member.

NOTE:

- We suggest you prepare an SOP to institutionalize these steps for your new MCCS Program staff members.
- Share this procedure with your colleagues.
- If one doesn't exist, encourage development of an MCCS Program SOP applicable to all new MCCS Program staff members.
- Add any check-in/turn-over items that you discover during your initial indoctrination that we did not include.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.2

Establish and Monitor a Facility/FF&E Maintenance Program

DO THIS TASK WHEN

- There is no adequate/up-to-date plan in place to ensure that the facility's internal and external spaces are inspected and maintained.
- There is no adequate plan in place to ensure the Program's machinery, tools, vehicles, and equipment are cleaned, adjusted, lubricated, renovated, refurbished, repaired, and/or replaced as needed.
- New machinery, tools, vehicles, or equipment are purchased for the Program.
- New facility spaces are acquired/constructed.
- The condition of the Program's facilities and machinery, tools, vehicles, and equipment are one of the obvious reasons for customer/patron defections, dissatisfaction, or increasing complaints.
- The condition of the Program's facilities and machinery, tools, vehicles, or equipment are falling into obvious disrepair more rapidly than is typical in normal "wear & tear".

REFERENCES

- MCO P1700.24 (series), MCCS Policy Manual.
- MCO 1710.30D, Marine Corps Children and Youth Program.
- Local NAF and APF instructions/policies.

SUPPLIES/ RESOURCES

- Equipment installation guides.
- Manufacturers' operating/maintenance manuals.
- Applicable contracts/excerpts for inspection, maintenance, servicing, renovation, and repair.
- Preventive maintenance (PM) schedules/checklists.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- The facility's internal and external physical spaces are included in a routine inspection and preventive maintenance schedule.
- The Program's critical machinery, tools, vehicles, and equipment are included in a routine inspection and PM schedule.
- The facility's physical spaces are inspected, cleaned, maintained, renovated, redecorated, refurbished, and/or repaired as needed.

THIS TASK IS DONE CORRECTLY WHEN (cont.)

- The Program's machinery, tools, vehicles, and equipment are cleaned, adjusted, lubricated, renovated, refurbished, repaired, and/or replaced as needed.
- Results of routine inspections are accomplished with minimal hits and corrective actions/measures followed.

NOTES

It is essential that all your facility's internal and external spaces and your Program's machinery, tools, vehicles, and equipment be maintained in the best possible condition to ensure:

- Customer/patron safety, health and welfare.
- Equipment reliability to build and maintain customer/ patron confidence, enjoyment, and satisfaction with your Program.
- Reduced/controlled maintenance costs over the useful life of the facility's spaces and the Program's machinery, tools, vehicles, and equipment.

Your overall PM program will be significantly enhanced if you maintain a logbook or computer database that documents all maintenance schedules, requests, dates, assignments, and costs.

This task and all of Duty 8.0 refer to inspection, maintenance, sanitation, safety and operating ***policy***. This refers to ALL relevant instructions, notices, messages and official memoranda from:

- The Department of the Navy or higher.
- Headquarters Marine Corps or higher.
- Your Command or higher.

NOTES (cont.)

- Your MCCS or higher.
- All applicable vendor/manufacturer maintenance, operating, and warranty guidance.

VALUE

There are at least three *important* reasons for maintaining PM schedules and inspection checklists.

- The first is that everyone on the staff knows WHEN everything needs to be done (the PM schedule).
- The second is that each staff member does NOT have to memorize every nit-pick detail for every maintenance procedure. He/she simply follows the guidance on the checklist.
- The third is that you have a system with standards and guidelines by which you can:
  - Confirm whether or not everything is getting done.
  - Determine whether or not each staff member is accomplishing his/her assignments.
  - Be confident that the minimum maintenance requirements and standards are being accomplished.
  - Determine if all the Program's spaces, machinery, tools, vehicles, and equipment are being routinely inspected to determine continued functionality, safety, and usefulness to the Program.
  - Ensure excess, unserviceable, and obsolete machinery, tools, vehicles, and equipment are identified and disposed of properly.
  - Staff and customer/patron risks are minimized.
  - Maintenance costs are minimized.
  - Anticipated service-life is achieved/exceeded.

NETWORK

All your colleagues on your base and throughout the armed forces MWR/MCCS systems have this same requirement. Share with them what you've developed and ask them for copies of their PM programs and their inspection and maintenance checklists. Don't neglect your active duty neighbors; the Navy uses automated maintenance systems everywhere, so take a look at some of their designs. And finally, look at your industry competitors.

Take every opportunity to ask the Program managers in your MCCS Program as well as your colleagues around the MCCS system:

- How they accomplish their inspections and PM?
- What effective techniques they've employed to establish and maintain a positive and effective relationship with their vendors, suppliers, and contractors?
- What communication and project management systems/ software they've found useful to their PM and inspection programs?
- What techniques they've employed to maintain an effective relationship with the on-base departments responsible for inspection and maintenance of various aspects of their MCCS Programs?
- What vendors, suppliers, and contractors they rely on and why?

And when you discover information that makes a significant improvement in your PM and inspection programs, share it with the entire field--contact your MCCS Program Manager via your MCCS chain of command.

AUTOMATION

This task, Establish & Monitor a Facility/FF&E Maintenance Program, is much easier and more effective if you automate the schedule.

A paper-based system is better than no system, but a computer-based automation of this process can provide:

- Daily reminders (ticklers) of what needs to be inspected.
- Printouts of your various checklists.
- Maintenance cost tracking.
- Elaborated/expanded details of the maintenance steps/ procedures.
- Illustrated parts lists.
- Critical Path Modeling (CPM), work flow charts (GANTT charts), and program evaluation review techniques (Pert charts).
- Multiple report options...,

  E.g.,
  - by facility.
  - by equipment type.
  - by inspection type.
  - by inspectors (staff).
  - by dollar values/worth/cost.
  - depreciation scheduling.
  - time tracking.
- Ability to add/delete/modify procedures, tasks, steps.
- Ability to add/delete items on the maintenance schedule.

PROCEDURE

Step 1 Review all Headquarters, (MR) MCCS, and local policy that contain facility, equipment, machinery, tool, and vehicle inspection and maintenance requirements applicable to your Program.

NOTE:	Your attention to all maintenance details and responsibilities will help you provide your staff timely and effective on-the-job training, guidance, direction, coaching, and counsel regarding facility, machinery, tools, vehicle, and equipment inspections and maintenance. Refer to Task 9.3, Develop Internal Policies/Procedures (SOPs), if you need to write or review/revise your local policies.

As the Program manager, you should be able to answer the following policy related questions:

- What maintenance policy (instructions, notices, messages, bulletins, official memoranda, and Standard Operating Procedures [SOPs]) apply to your Program's internal and external facility spaces, and your Program's machinery, tools, vehicles, and equipment?
- What is the scope and purpose of each maintenance policy?
- Are each of the policies up-to-date? (If you answer NO, up-date/add these.)
- Who is responsible for accomplishing the tasks and steps detailed in the maintenance policies?
- Are these specifics included in the policies? (If you answer NO, up-date/add these.)
  - quality standards?
  - schedules/frequencies?
  - assignments, responsibilities, and required skills?
  - what, when, where, why and how-to-do?
  - required supplies, tools, and/or equipment?
  - required adjustments?
  - replacement schedules?
  - safety precautions?
- Should other areas/details/tasks/steps be included in the maintenance policies? (If you answer YES, update them.)

Step 2 Ensure your staff has access to all applicable equipment inspection/ maintenance documents.

☐ Provide copies of your local policy/SOPs to each staff member as appropriate to his/her inspection and maintenance responsibilities.

☐ Ensure your staff is aware of both the location and the content of all applicable Headquarters, (MR) MCCS, Command, and/or higher authority inspection, maintenance, safety, and sanitation instructions, policies, notices, messages, and bulletins.

NOTE: Many of these policies and procedures were provided with your machinery, tools, vehicles, and equipment and included:

- Operator's manuals.
- Trouble-shooting guides.
- Parts lists.
- Maintenance manuals.
- Lubrication/cleaning guides and schedules.
- Safety requirements/precautions.
- Warranty information.

Step 3 Prepare a draft list of the machinery, tools, vehicles, and equipment, ***critical*** to your Program, business or office that require inspection, maintenance, periodic lubrication/adjustment, safety checks/inspection, replacement cycles/schedules, sanitation operations, etc.

NOTE: You will use this list to:

- Assign responsibilities.
- Ensure existence of up-to-date guidance.
- Prepare inspection and maintenance schedules and checklists.
- Ensure excess, unserviceable, and obsolete machinery, tools, vehicles, and equipment are identified and disposed of properly.

Step 4 Using the list you prepared in Step 3, determine who is responsible for maintaining and/or servicing each one.

IF MAINTENANCE/ SERVICE IS THE RESPONSIBILITY OF:	AND FACILITY/ EQUIPMENT IS:	THEN:
Program staff.	→	Continue with Step 5.
Base/MCCS Maintenance. **-OR-** Vendor (equipment is under warranty or service contract).	Being routinely inspected, serviced, and/or maintained.	1. Review Steps 5-10. 2. Ensure PW/contractor performed inspections and maintenance meets the standards necessary for your Program. 3. Communicate unsatisfactory performance to your immediate supervisor or the facilities manager immediately.
	NOT being routinely inspected, serviced, and/or maintained.	1. Contact facilities manager, PW, or vendor to remind them of responsibility for maintenance/service. 2. Schedule maintenance service call. 3. Communicate unsatisfactory performance to your immediate supervisor as soon as possible. 4. Continue with Step 12.

NOTE: You may find it useful to assign a staff member responsibility for maintenance follow-up. Ensure you give sufficient lead-time for on-base provided services/maintenance. Ensure you know the scope of services provided by public works. Ensure you and your staff use the chain of command to communicate with maintenance, vendors, building manager, contractors, etc.

Step 5 Indicate the following on the rough list prepared in Step 3.

- ☐ Who is assigned to accomplish each inspection/maintenance item?
- ☐ Where the up-to-date inspection and maintenance schedules are located.
- ☐ The item-by-item inspection and maintenance schedule.

NOTE:	Do this for everything in your Program that requires inspection, maintenance, periodic lubrication/adjustment, safety checks/ inspection, replacement cycles/schedules, or sanitation operations.

Step 6 Use the example checklists at the end of Task 8.3, Inspect Facility/FF&E for ideas to prepare or revise/modify your Program's inspection, PM, and service schedules.

- ☐ Ensure all facility spaces, machinery, tools, vehicles, and equipment are included in your Program's inspection, PM, and service schedules.
- ☐ Prepare these in a draft format for internal review.

Step 7 Ensure your Program's PM details, service schedules, and inspection check-lists are reviewed and edited.

Your reviewers may include:

- Your staff. *(Especially!)*
- Your immediate supervisor.
- Your colleagues/peers.
- MCCS/Base Maintenance and/or the Safety/OSHA office, if applicable.
- Vendors/suppliers.

Step 8 Use the feedback from the previous Step to edit and finalize your Program's PM details, service schedules, and inspection checklists.

Step 9 Prepare and post/distribute copies of your Program's PM details, service schedules, and inspection checklists.

Distribute and post copies to:

- ☐ Assigned performers.
- ☐ Your supervisors and your immediate supervisor.
- ☐ Applicable posting areas such as by equipment, supply rooms, on bulletin boards, in computer or paper-based daily schedules. (E.g., things-to-do lists, pass-down logs, etc.)
- ☐ Files.

Step 10 Indoctrinate your staff on their responsibilities, assignments, and tasks in your Preventative Maintenance (PM) program.

- ☐ Record the indoctrination/training in each individual's training records. (See Task 6.5, Train/Develop Staff.)
- ☐ Ensure each staff member knows his/her individual responsibilities and can demonstrate:
  - When to order maintenance supplies and equipment.
  - What he/she is supposed to check/inspect, when, and how often.
  - What he/she is supposed to do during each check/inspection.
  - What he/she is supposed to do when a discrepancy is discovered.
  - What he/she is supposed to do when an item is believed to be excess, unserviceable, or obsolete.
  - How he/she is to perform applicable cleaning, adjustments, sanitation, lubrication, and repair/replacement steps.
  - The quality requirements for each maintenance action.
- ☐ Ensure each staff member has access to up-to-date inspection and maintenance checklists and operating guidelines/instructions.
- ☐ Ensure each staff member has access to the tools, equipment and supplies necessary to perform assigned inspection and maintenance.

Step 11 Supervise your staff to ensure all inspections and maintenance actions of facility spaces, machinery, tools, vehicles, and equipment are performed when due or necessary.

- ☐ Confirm all inspections and maintenance actions are accomplished in accordance with provided checklists.
- ☐ Ensure all applicable instructions, SOPs, manuals, checklists, and job-aids are accessible to staff.
- ☐ Confirm staff members use and annotate checklists/documents as required.
- ☐ Confirm staff members perform all operator maintenance in accordance with provided checklists and other maintenance guides, documents, or policy.
- ☐ Establish administrative procedures.

Step 12 Determine course of action when scheduled maintenance/service requires equipment downtime.

IF EQUIPMENT DOWNTIME WILL:	THEN:
Restrict daily operations.	1. Schedule maintenance for scheduled closing hours as much as possible. 2. Advertise the upcoming maintenance as widely as possible. 3. Post signs apologizing for any customer/patron inconvenience. 4. Continue to provide the best service and products possible.
Force the operation to close.	1. Schedule maintenance to reopen operation as soon as possible. 2. Inform customers/patrons of both closing and reopening date and time. 3. Post signs apologizing for any customer/patron inconvenience.

NOTE: Whenever possible schedule maintenance/service when equipment is not in use. Scheduled, routine PM will minimize unscheduled downtime.

Step 13 Spot-check frequently for compliance.

IF STAFF/PW/VENDORS ARE IN:	THEN:
Compliance with inspection and PM program.	Provide positive feedback meeting and exceeding their responsibilities regarding your PM program.
Non-compliance with inspection and PM program.	1. Take corrective action. 2. Document action taken. 3. Follow up as required to obtain compliance.

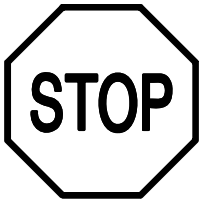
NOTE: See the following tasks regarding staff performance:

- Task 4.8 Coach, Counsel, Tutor, and Mentor.
- Task 6.8 Monitor and Improve Staff Performance.
- Task 6.10 Reward, Incentivize, and Motivate Staff.
- Task 6.14 Discipline Staff.

Step 14 Continue to monitor inspection/maintenance program for compliance and efficiency.

Step 15 Adjust the details of your PM program as applicable.

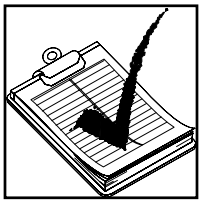
- ☐ Changes occur in your facility's internal and external spaces.
- ☐ Machinery, tools, vehicles, and equipment are added or disposed.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.3



Inspect Facility/FF&E

DO THIS TASK WHEN

- Prescribed by local or higher authority/policy.
- Scheduled preventive maintenance (PM) program dates, times, events occur.
- Establishing or reviewing/revising a PM, inspection, safety, or sanitation program for your facility's internal and external spaces and/or for your machinery, tools, vehicles, and equipment.
- Assigning staff member responsibility for inspection and maintenance of your facility's internal and external spaces and/or for your Program's machinery, tools, vehicles, and equipment.
- Conducting opening/closing walk-through procedures.
- A Command or staff official is scheduled to visit your Program's facilities/spaces.
- Command or higher staff visits are scheduled/ anticipated (e.g., security, fire, safety/OSHA, risk management, preventive medicine, etc.).
- Zone inspections are scheduled/anticipated.
- Open house or other major activities are scheduled.
- Following security breach.

DO THIS TASK WHEN (cont.)

- Indoctrinating new staff members.
- New machinery, tools, vehicles, or equipment are introduced into the Program, business or office.
- New spaces are acquired/constructed for the Program, business or office.
- The condition of the Program's facilities and machinery, tools, vehicles, and equipment are one of the obvious reasons for customer/patron defections, dissatisfaction, or increasing complaints.
- The condition of the Program's facilities and machinery, tools, vehicles, or equipment are deteriorating more rapidly than is normal "wear & tear".

REFERENCES

- MCO P1700.27 (series), MCCS Policy Manual.
- MCO P12000.11A, Marine Corps Nonappropriated Fund Personnel Policy Manual.
- Local policy on inspections and inspection criteria.

SUPPLIES/ RESOURCES

- Blank checklists.
- PM schedule and assignments.
- Up-to-date standard operating procedures (SOPs).
- Excerpts/copies of all inspection, servicing, maintenance contracts.
- Copies of existing warranties.
- Equipment installation guides.
- Manufacturers' operating/maintenance manuals.
- PM schedules/checklists.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Scheduled inspections are performed when due.
- Scheduled inspections are performed using locally prepared checklists.
- Appropriate maintenance is accomplished in accordance with prescribed standards.
- All the Program's machinery, tools, vehicles, equipment (FF&E), minor property, and supplies are inspected as needed and as scheduled.
- All internal and external spaces are inspected as needed and as scheduled.
- All excess, unserviceable, and obsolete machinery, tools, vehicles, and equipment are identified and disposed of properly.

THIS TASK IS DONE CORRECTLY WHEN (cont.)

- The results of inspections by departments with oversight or inspection authority are positive and require minimal corrective action.
- Corrective action is scheduled to ensure prompt accomplishment and avoids repeat deficiencies.
- Customer/patron service quality is heightened due to effective inspection procedures and PM.

NOTES

You need to inspect your facilities and your furniture, fixtures and equipment (FF&E), minor property and supplies frequently to ensure they remain in top condition.

This task will help you:

- Prepare and use inspection checklists.
- Assign inspection and maintenance responsibilities.
- Confirm accomplishment of required/scheduled inspections and maintenances.
- Determine which type inspections are required and how to accomplish them.
- Provide maintenance in accordance with policy and instructions.
- Ensure excess, unserviceable, and obsolete machinery, tools, vehicles, and equipment are identified and disposed of properly.

NOTES (cont.)

Maintaining your facility and your FF&E in top-notch condition ensures:

- Customer/patron safety.
- A level of equipment reliability that contributes to customer/patron confidence, enjoyment, and satisfaction.
- Reduced/controlled maintenance costs.
- Extended service life of machinery, tools, vehicles, and equipment.

NETWORK

All your colleagues on your base and throughout the armed forces MCCS systems have this same requirement. Share with them what you've developed and ask them for copies of their inspection and maintenance checklists. Don't neglect your active duty neighbors--the Navy uses many automated inspection systems, so take a look at some of their designs. And finally, look at your industry competitors.

Take every opportunity to ask the Program managers in your MCCS Program as well as your colleagues around the MCCS/ MWR system:

- How they accomplish their inspections and PM?
- What techniques they've employed to establish an effective relationship with their vendors, suppliers, and contractors?
- What communication and project management systems/ software they've found useful to their PM and inspection programs?
- What techniques they've employed to establish an effective relationship with the on-base departments responsible for inspection and maintenance of various aspects of their Programs?
- What vendors, suppliers, and contractors they rely on and why?

And when you discover information that makes a significant improvement in your PM and inspection programs, share it with the entire field--contact your MR Program Manager via your MCCS chain of command.

AUTOMATION

This task, Inspect Facility/FF&E, is much easier and effective if you automate the inspection processes.

A paper-based system is better than no system, but a computer-based automation of this process can provide:

- Daily reminders (ticklers) of what needs to be inspected.
- Printouts of your various checklists.
- Inspection and maintenance cost tracking.
- Expanded details of the maintenance and inspection steps/procedures.
- Illustrated parts lists.
- Multiple report options.

  Example:

  - By facility.
  - By equipment type.
  - By inspection type.
  - By inspectors (staff).
  - By dollar values/worth/cost.
  - Depreciation scheduling.
  - Time tracking.

- Ability to add/delete/modify inspection procedures, tasks, steps.
- Ability to add/delete items on the maintenance schedule.

PROCEDURE

Step 1 Decide what to do regarding your PM program for your facilities and FF&E.

IF YOU:	AND:	THEN:
Have a PM program as described in Task 8.2.	You recently reviewed it and found the program to be *complete* and *up-to-date*.	Continue with Step 2.
	You have **NOT** recently reviewed the program.	Complete all the steps in Task 8.2 before doing this task.
	You believe the program to be *incomplete* OR *out-of-date*.	
Do **NOT** have a PM program as described in Task 8.2.	→	

NOTE: You need a PM program in place that ensures regularly scheduled inspections and maintenance actions. Otherwise you and your staff will leap from one problem to the next, seemingly never able to "catch-up"! (See Task 8.2, Establish & Monitor a Facility/FF&E Maintenance Program.)

Step 2 Prepare a list of everything in your Program that requires inspection, maintenance, periodic lubrication/adjustment, safety checks/inspection, replacement cycles/schedules, sanitation operations, including all your facility's internal and external spaces.

NOTE: This step is already done if you've completed Task 8.2, Establish & Monitor a Facility/FF&E Maintenance Program.

Step 3 Contact Base or MCCS Maintenance or building manager to identify all their inspection, service, and maintenance responsibilities for APF FF&E within your Program.

IF RESPONSIBILITY IS:	THEN:
Base/MCCS Maintenance, building manager or other department.	1. Contact them to learn their maintenance schedule. 2. Monitor to ensure compliance.
Your Program's.	Continue with Step 4.

Step 4 Gather all the inspection checklists you are currently using in your PM program or otherwise in your Program.

NOTE: Review the checklists that begin on page 8.3.23 at the end of this task.

- These are included to give you examples of the type checklists you might use in your Program.
- All of the forms are on the CD provided with this desk reference, formatted in MS Word for Windows.
- You may modify these forms to suit your local needs or make copies of the examples and apply them as is. You can, of course, design your own forms using any appropriate software application, service bureaus, or perhaps your marketing office.
- Ask your immediate supervisor and your colleagues if they are aware of any checklists that you *should* be using or if they have any you might be able to adapt to your Program.

Step 5 Compare your checklists and those provided at the end of this task to the list you gathered in Step 4.

Ensure you have inspection and maintenance checklists for:

- ☐ All your facility's internal and external spaces.
- ☐ Each major equipment item used in your Program.
- ☐ Each vehicle used in your Program.
- ☐ The tools used in your Program.
- ☐ Each item you would classify as FF&E, minor property, and supplies.

NOTE:	For this task, *inspection* and *maintenance* checklists differ in that inspection checklists guide the inspection process, while maintenance checklists detail cleaning, adjusting, aligning, lubricating, sanitizing, replenishing, refilling, charging, replacements, resupply, assembly/ disassembly, safety/operational tests, etc. Both types should include the frequency of performance, quality requirements/standards, who is responsible, and provide spaces for dates, times, annotations/notes/comments, and inspector validation.

Step 6 For each inspection and maintenance checklist, decide how often you or your staff members should conduct the inspection or maintenance procedures.

IF THE INSPECTION/ MAINTENANCE IS FOR:	THEN YOU MAY WANT TO SPECIFY A FREQUENCY OF:
Start-up/close-up (including shifts).	• Daily at specified times.
Safety, injury/risk prevention areas/issues/measures.	• Daily, at specified times, on-going/constant.
Sanitation.	• After each use. • Daily, weekly, monthly. • New staff member indoctrination. • Team/staff meetings. • Posted as a guide.
Maintenance.	• Daily, weekly, monthly, as prescribed by the manufacturer.
Security	• On going, daily, weekly. • Prior to official inspections. • After a report of a violation.
Food storage/preparation areas.	• Beginning/end of shift. • Throughout shift. • After food/supply deliveries. • After food preparation/service.
Staff spaces.	• On-going, daily, at specified time(s). • Beginning/end of shift. • Weekly/monthly.
Customer/patron areas.	• After each use. • Daily, at specified time(s). • Beginning/end of shift. • Weekly/monthly. • Seasonal.
Bathrooms, locker rooms, and showers.	• Daily, at specified time(s). • Beginning/end of shift. • Weekly.
Program equipment, machinery, tools.	• Beginning/end of shift. • Daily, weekly, monthly, as prescribed by the manufacturer. • Seasonal.
Program vehicles.	• Beginning/end of shift or each use. • Daily, weekly, monthly, as prescribed by the manufacturer.

Step 7 Prepare (in draft form) new and/or revised inspection and maintenance checklists based on your findings and accomplishments in Steps 1-6.

Apply the following technique for preparing and or revising checklists:

☐ Actually go through the process with one or more accomplished staff members who do the inspection well.

☐ Watch what they do and record, in order (sequence), everything he/she does.

☐ At every decision point, ask the performer:

- Why he/she did the step at all?
- How he/she knew to do the step?
- How he/she knew when the step should be done?
- How he/she knew what should be done?
- What methods and techniques he/she applies and why?
- How he/she would determine if any item is excess, unserviceable, obsolete and what to do?
- What precautions, if any, are important?
- What preparation, if any, is necessary?
- What notifications, communications, coordinations, if any, are important?
- What supplies, equipment are needed?
- How he/she recognizes that the inspection or maintenance procedure is done correctly?
- What, if anything, he/she has to do AFTER the task is completed?
- What guidance is needed; SOPs, instructions, etc.

Step 8 Test each new/revised draft inspection and maintenance checklist to ensure the checklist:

- ☐ Accomplishes all requirements of your PM program.
- ☐ Accomplishes all requirements of your local (or higher authority) inspection and maintenance requirements.
- ☐ Covers all your facility's internal and external spaces. (E.g., walls, doors, windows, floors, lighting, signage, and decorations. Also the parking areas, trash areas, store rooms, lounges and office areas, bathrooms, locker rooms, entry ways, decks, lawns, fields, loading docks, fencing, field lights, etc.)
- ☐ Covers all major equipment/machinery items used in your Program, business or office that would stop or significantly hinder operations. (E.g., HVAC, water heaters, generators, compressors, refrigerators, ovens, grills, POS systems, office equipment, computers, P.A./music systems, pin setters, first aid kits/supplies, defibrillators, etc.)
- ☐ Covers each item you would classify as FF&E, minor property and supplies. (E.g., sinks, toilets, showers, water fountains, signs, marquees, scoreboards, desks, chairs, counters, tables, registers, phones, play ground equipment, sports and recreation equipment, etc.)
- ☐ Covers each vehicle used in your Program. (E.g., vans, sedans, pickups, buses, boats, trailers, tractors, mowers, street sweepers, carts, etc.)
- ☐ Covers hazardous materials (HAZMAT) restrictions and handling requirements.

Step 8 (cont.)

- ☐ Indicates what the inspector/maintenance person is supposed to do when he/she encounters a problem.
- ☐ Are sequenced in a logical order..., that is, the order most convenient and logical to the user.
- ☐ Have similar appearing formats/designs and includes art work where needed.
- ☐ Are written in the “lingo” of the intended users.
- ☐ Are free of unnecessary verbiage.
- ☐ Are free of typos, spelling, and grammatical errors.
- ☐ Include frequency of performance.
- ☐ Indicate the responsible performer.
- ☐ Explains what to do with items that are thought to be excess, unserviceable, or obsolete.
- ☐ Include applicable performance standards.
- ☐ Provide for dating, signing, and countersigning/validation as applicable.
- ☐ Time required for retention of files.

Step 9 Route your new/revised draft inspection and maintenance checklist for review and approval.

Depending on the content of the checklist and your local policies, routing may include:

- Your staff members who will be required to use the checklist(s).
- Your immediate supervisor.
- The MCCS Deputy/Director.
- Safety/OSHA office.
- Base or MCCS Maintenance.
- Legal.
- MR or higher.

☐ Set a date for return (2 weeks should be sufficient).

☐ Explain what you expect each reviewer to do, and NOT to do.

☐ Route no higher than needed.

Step 10 Enter edits and accommodate applicable comments from the results of Step 9 above. (Provide positive feedback to everyone who helps on this step.)

Step 11 Determine the best media for each checklist.

IF THE CHECKLIST:	AND:	THEN:
Will be used in a roving type inspection.	You do **NOT** want or are **NOT** required to maintain copies for the record.	Make copies of the finalized checklists on plain paper.
Will be used in one area or by one piece of equipment/ machinery.	You want or are required to maintain copies for the record.	1. Make copies of the checklists. 3. Make a copy for the record.
	You do **NOT** want or are **NOT** required to maintain copies for the record.	1. Have the checklist prepared as a sign. **-OR-** 2. Laminate the checklist. 3. Post the sign or laminated checklist conspicuously in the area or near the applicable equipment/ machinery.

Step 12 Indoctrinate your staff on their responsibilities, assignments, and tasks and in the use of your Program's inspection and maintenance checklists.

☐ Ensure each staff member knows his/her individual PM program responsibilities and can demonstrate:

- What he/she is supposed to check/inspect, when, and how often.
- What he/she is supposed to do during each check/inspection.
- What he/she is supposed to do when a discrepancy is discovered.
- What he/she is supposed to do with any item believed to be excess, unserviceable, obsolete.
- How he/she is to perform applicable cleaning, adjustments, sanitation, lubrication, and repair/replacement steps.
- Applicable safety precautions.
- Applicable regulations.
- The location of everything and/or each item detailed on the checklist.
- The location of all necessary tools, supplies and equipment needed to accomplish the inspection/maintenance requirement.
- The safe, appropriate, and economical use of all maintenance supplies.
- All applicable hazardous materials (HAZMAT) conditions and policy are accomplished.
- The quality requirements for each maintenance action.

☐ Ensure each staff member has access to copies of up-to-date inspection and maintenance checklists and operating guidelines/instructions.

☐ Ensure each staff member has access to the tools, equipment and supplies necessary to perform their assigned inspection and maintenance responsibilities.

☐ Document the indoctrination.

NOTE: Checklists are **NOT** training. They are to be used as on-the-job reminders and should only be used by trained staff members.

Refer to Task 6.5, Train/Develop Staff for information about On-The-Job Training and staff development.

Step 13 Monitor your PM program and the use of your inspection and maintenance checklists.

☐ Observe and spot-check to ensure staff is using the checklists:

- At the right date, day, and/or time.
- By the assigned staff member.
- Correctly and completely.

☐ Reinforce the continued correct use of checklists.

IF MANAGEMENT TOOL IS:	THEN:
Used: • At the right day and/or time. • By the assigned staff member. • Correctly and completely (e.g., all boxes, dates, and initial spaces are filled in). • And filed as designed.	1. Tell the staff member what he/she did correct. 2. Reinforce why use of management tool is important. 3. Provide appropriate reward. 4. Observe/monitor future use of the checklist(s). 5. Document for future evaluations.
NOT used: • At the right time. • By the right staff member. • Correctly and completely (e.g., all boxes, dates, and initial spaces are filled in). • And filed as designed.	1. Tell the staff member what he/she is **NOT** doing correctly. 2. Tell why use of management tool is important and demonstrate how to use, (if needed). 3. Confirm staff member understands why and how to use management tool. 4. Observe/monitor future use of the checklist(s). 5. Document as support for corrective actions.

NOTE: Accountability is the key to the success of your PM program and, for that matter, all staff performance.

If you want sustained superior performance, then require it, train for it, observe it, acknowledge and reward it..., and hold every staff member equally accountable. Anything less is NOT acceptable in today's business climate.

Step 14 Provide guidance/appoint someone to be present when you cannot be there for an inspection in which you are typically involved or you usually perform.

Step 15 Conduct periodic walk-through and spot-check inspections of your facility using appropriate checklist(s).

Step 16 Verify ALL inspections and maintenance/service operations performed by contractors, vendors, and other Marine Corps/military/host Departments.

NOTE: **This is a very important management responsibility!**

You manage a PM program and hold yourself and your staff accountable to high quality inspections and maintenance of your facility spaces and your Program's FF&E.

Therefore you should hold your contractors, vendors, and other Marine Corps/military/host Departments to these same high standards.

The difficulty is that you have considerable control of yourself and your staff, but much less with your outside service providers. Tact, consideration, and patience, as well as up-front, honest communication will go a long way towards getting the quality, performance standards, and timeliness you expect. Find out precisely what the outside services are "supposed" to accomplish.

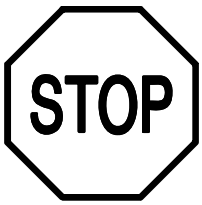
Meet with your providers face-to-face to discuss quality standards beforehand as well as in follow-up. Communicate frequently to maintain a positive, problem-solving relationship..., and do this even when things are perfectly okay with your outside service providers.

Ensure you have authority to make direct contact with outside or on-base service providers.

Step 17 Take corrective action where required to repair damage and/or replace missing items. (Refer to Task 8.4, Correct Facility/FF&E Discrepancies.

Step 18 Document and follow-up on your walk-through and spot-check inspection as appropriate.

Step 19 File documentation as appropriate.



Congratulations! You've completed this task.

INSPECTION & MAINTENANCE CHECKLISTS	
CHECKLIST:	**ON PAGE**
Bar Back's Closing Checklist.	8.3.89
Bar Back's Daily Cleaning Checklist.	8.3.87
Bar Back's Opening Checklist.	8.3.85
Bartender's Closing Checklist.	8.3.77
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WEEKLY PREVENTIVE MAINTENANCE/SERVICE SCHEDULE

FACILITY: _____ **DATE:** _____

Items to Check	Okay	NOT Okay	Comments
Light fixtures: Clean, de-grease, and replace burnt out bulbs.			
Vents: Remove, clean, and replace.			
Compressors, A/C, and other filters: Clean and/or replace.			
Char-broilers and grills: Dismantle, de-grease, and decarbonize.			
Ice machines: Defrost, clean, and sanitize.			
Refrigerator/Freezers: Defrost, de-ice, clean, and sanitize.			
Heavy equipment: Strip, clean, and oil, if required.			
Stoves/Burners: Clean and clear jets.			
Ovens/Griddles: De-grease, test temperature, and calibrate, if needed.			

Note in the comments section any item you believe to be excess, unserviceable, or obsolete.

PREVENT PEST/RODENT INFESTATION CHECKLIST

DATE: _____ **INITIALS:** _____

CHECK FOR:	OK	NOT OK	COMMENTS
Regular professional pest and rodent control services are provided.			
Feeding/breeding opportunities are minimized. (Narrow spaces between and under furniture are filled or regularly treated.)			
Cleaning and Sanitation: Residue and mildew on equipment or surface is cleaned regularly. Garbage is removed to appropriate disposal units regularly. Garbage dumpsters are dumped regularly. Garbage containers are tightly covered. Spills and standing water is cleaned up immediately.			
Products and Supplies: Boxes are not stored on the floor. Boxes in storage do not touch walls.			
Building Maintenance: Walls and floors are free of holes and cracks. Doors and window screens are tightly sealed and free of holes. Fly fans or air curtains are used. All doors are self-closing.			
Cleaning Supplies: Dirty/worn-out mops are thrown away. Sanitizing liquid is used regularly.			
Incoming supplies are inspected for infestation.			
An up-to-date SOP is provided, describing what to do to prevent pest and rodent infestation.			

OPERATOR'S VEHICLE MAINTENANCE/SERVICE CHECKLIST

OPERATOR'S NAME: _____ **DATE:** _____ **VEHICLE #** _____

CHECK FOR:	OK	NOT OK	COMMENTS
1. Dents/damage to body work, glass or mirrors.			
2. Correct tire pressure.			
3. Lights operating.			
a. Brake lights.			
b. Headlights (high/low beam).			
c. Turn indicators.			
d. Parking lights.			
e. Emergency flashers.			
4. Fluid levels.			
a. Gasoline.			
b. Engine oil.			
c. Transmission oil.			
d. Brake fluid.			
e. Steering fluid.			
f. Windshield fluid.			
5. Brake operation. (Pedal has resistance.)			
6. Seat belts working.			
7. Emergency kit (flares, first aid, reflectors, etc.).			
8. Tire change tools and spare tire.			

Note in the comments section any item you believe to be excess, unserviceable, or obsolete.

RANDOM EQUIPMENT MAINTENANCE/SERVICE INSPECTION CHECKLIST

Date:			**Done by:**		
Equipment	**Yes**	**No**	**Equipment**	**Yes**	**No**
Check Wiring:			**Cooling Equipment:**		
Overloaded outlets.			Dust on coils.		
Frayed, kinked, tangled cords or wires.			Minerals buildup.		
			Frost buildup.		
Loose outlets/plugs.			Thermostat accurate.		
Ungrounded plugs.			**Beverage Dispensers:**		
Moisture nearby.			Syrup buildup around nozzle.		
Illegal use of extension cords.			Mixtures out of balance.		
Plumbing/Piping:			Amount dispensed correct.		
Visible moisture.			Dripping nozzles.		
Stains, drip marks.			CO_2 pressures correct, tank secured.		
Tangled, kinked flexible tubing.			**Small Appliances:**		
Deterioration of rigid piping or flexible tubing.			Housing, parts dirty/worn.		
			Visible oil/moisture on housing.		
Drains clean, odor free.			“Funny” noise when running.		
Heating Equipment:			“Walking” when running.		
Burners, coils crusted/greasy.			**Other Equipment:**		
Buildup on heat sensors.			Sound, light, and video free of dust and in working order.		
Thermostat accurate.			Point-of-Sale (POS) system in good working order.		

Note on reverse any item you believe to be excess, unserviceable, or obsolete.

FACILITY INSPECTION CHECKLIST

FACILITY _____

Date: _____ **Initials:** _____

Area checked	OK	Not OK	Comment
ENTRANCE/EXITS:			
Lighting.			
Doors.			
Locks.			
Parking area.			
Signage.			
Trash.			
Furniture.			
Display cases.			
General appearance.			
Other...			
LOCKER/SHOWER ROOM:			
Lighting.			
Supplies.			
Signage.			
Fixtures.			
Furniture.			
General/cleanliness.			
General appearance.			
Other...			

COMMENTS:

Note in the comments section any item you believe to be excess, unserviceable, or obsolete.

FACILITY INSPECTION CHECKLIST (cont.)

FACILITY _____

Date: _____ **Initials:** _____

Area checked	OK	Not OK	Comment
MULTI PURPOSE AREAS:			
Lighting.			
Doors/flooring.			
Equipment.			
Signage.			
General appearance.			
Other...			
GENERAL/COMMON AREAS:			
Heating/Air Conditioner.			
Windows.			
Hallways.			
Admin/office spaces.			
Emergency lighting.			
Bulletin boards.			
Signage.			
Display cases.			
Walls/floors/ceiling.			
General/cleanliness.			
REST ROOMS:			
Supplies.			
Lighting.			
Fixtures.			
Cleanliness.			

COMMENTS:

Note in the comments section any item you believe to be excess, unserviceable, or obsolete.

RECREATION CENTER DAILY INSPECTION CHECKLIST

Date: _____ **Initials:** _____

Area checked	OK	Not OK	Comments
OFFICES/ADMIN/COMMON AREAS:			
☐ Clutter. ☐ Security. ☐ Cleanliness. ☐ Lighting. ☐ Storage area. ☐ Locked files. ☐ Equipment. ☐ Signage. ☐ Display cases. ☐ Flyer/brochure rack. ☐ Art work/plants. ☐ Other...			
VIDEO GAME AREAS:			
☐ Electric sockets/cords. ☐ Lighting. ☐ Ventilation. ☐ Cleanliness. ☐ Games operable. ☐ Security. ☐ Other...			
REST ROOMS:			
☐ Odors. ☐ Supplies. ☐ Lighting. ☐ Repair/maintenance. ☐ Other...			
TV/MUSIC LISTENING AREAS:			
☐ Furniture. ☐ Electric sockets/cords. ☐ Equipment. ☐ Lighting. ☐ Ventilation. ☐ Other...			

Note in the comments section any item you believe to be excess, unserviceable, or obsolete.

RECREATION CENTER DAILY INSPECTION CHECKLIST (cont.)

Date: _____ **Initials:** _____

Area checked	OK	Not OK	Comments
GAME ROOM:			
☐ Billiard tables. ☐ Table tennis. ☐ Equipment racks. ☐ Carpet/tiles. ☐ Furniture. ☐ Check-out counter. ☐ Lighting. ☐ Picture/posters etc. ☐ Publicity display. ☐ Doors/windows. ☐ Other...			
COMPUTER ROOMS:			
☐ Equipment. ☐ Tables/chairs. ☐ Electric outlets/cords. ☐ Paper supplies. ☐ Lighting. ☐ Ventilation. ☐ Heating/cooling. ☐ Resource tables. ☐ Other...			
SNACK BAR:			
☐ Equipment. ☐ Food storage. ☐ Refrigeration. ☐ Sanitation. ☐ Safety. ☐ Fire alarms. ☐ Extinguishers. ☐ Floors/walls. ☐ Garbage areas. ☐ Pest/rodent control. ☐ Security. ☐ Other...			

Note in the comments section any item you believe to be excess, unserviceable, or obsolete.

RECREATION CENTER DAILY INSPECTION CHECKLIST (cont.)

Date: _____ **Initials:** _____

Item	Yes	No	Action/Comment
Parking areas are clean and tidy.			
Dumpster areas are clean/tidy, odor free, and covered.			
Exterior walls/windows are clean and in good repair.			
Entries are clean.			
Rest rooms are clean and stocked.			
Dining/Service area floors, windows, and fixtures are clean.			
Tables, chairs, and booths are clean and in good repair.			
Food service area floors, walls, and tables are clean.			
Equipment is clean and working properly.			
Refrigerator/Freezer temperatures are in safe zones (record temperature).			
Service areas are clean and stocked.			
All lights are working correctly.			
Circuit breakers on.			
Alarms off.			
Security lights on.			

Note in the action/comments section any item you believe to be excess, unserviceable, or obsolete.

RECREATION CENTER DAILY INSPECTION CHECKLIST (cont.)

Date: _____ **Initials:** _____

Item	Yes	No	Action/Comment
Point-of-sale (POS) registers are cleared.			
All staff members have signed out.			
All equipment is clean, turned off, and unplugged.			
Cash drop procedures have been followed.			
Rest rooms are clean and stocked.			
Tables, floors, counters and booths are clean.			
Preparation areas are clean.			
All side-work is done. (Service items re-stocked.)			
Refrigerated/frozen foods covered and labeled.			
All areas secured and locked.			
Trash cans emptied and clean.			
Trash/garbage areas are clean and stocked.			
All lights (other than security) are off.			
Circuit breakers (as required) off.			
Alarm (if installed) is set.			
Exit Doors are locked.			
Security Lights on.			
Fire department or base security called for securing building (according to local policy).			

Note in the action/comments section any item you believe to be excess, unserviceable, or obsolete.

BUILDING SAFETY CHECKLIST

Date: **Initials:**

Item	Yes	No	Actions/Comments
Structure/Equipment is in good repair: • No cracks. • No blades chipped. • No loose floor tiles.			
Electrical wiring/connections are in good repair: • No frayed plugs. • No loose sockets. • No bare wires.			
Lighting in all areas is adequate.			
Floors are non-slip: • Floor has abrasive strips.			
Exits are clearly marked.			
Equipment is fitted with safety devices: • Blade shields. • Automatic cut-offs.			
All fire extinguishers (hand and heat activated) are marked with date serviced.			
All personnel are trained in use of fire extinguisher.			
Local fire codes are followed.			
Emergency phone numbers are posted by phones.			
Chemicals and cleaning products are stored away from food and food related items.			
Carpets in good repair.			

Note in the actions/comments section any item you believe to be excess, unserviceable, or obsolete.

PREVENT PERSONAL INJURY CHECKLIST

Date: **Initials:**

Item	Yes	No	Actions/Comments
Personnel are trained on all equipment they are required to use.			
Equipment is turned off when not attended.			
Electrical equipment is not used with wet hands.			
Staff members wear protective clothing that is not too loose/tight (e.g., cook's whites).			
Equipment is used only as intended.			
Tools/knives are stacked/stored safely.			
Spills are cleaned up immediately.			
Aisles/stairs/walkways are kept clear.			
Ladders are used where needed.			
Staff members are trained in correct lifting method.			
Carts are used for moving heavy objects.			

Note in the actions/comments section any item you believe to be excess, unserviceable, or obsolete.

DRY STORAGE CHECKLIST

Date: **Initials:**

Item	Yes	No	Actions/Comments
Storage areas are kept cool (50-60ºF).			
All items are at least 6” off the floor.			
All items are clear of walls.			
Storage shelves are clear of overhead sewer lines.			
All containers are closed.			
Floors are clean and clear of debris/empty cartons.			
All storage area keys are accounted for and authorized.			
Paper products are on designated shelf.			
Inventory items are in neat and orderly condition.			
Inventory items are not mixed.			
Items are labeled, priced, and dated according to local policy.			

Note in the actions/comments section any item you believe to be excess, unserviceable, or obsolete.

DISPOSAL/TRASH AREA CHECKLIST

Date: _____ **Initials:** _____

Area	Item	Yes	No	Actions/Comments
Dumpster.	Clean and clear surrounding area.			
	After pickup, sides and bottom are: • Clean. • Free of spillage.			
Trash cans/Grease barrels.	Lids on.			
	Liners used for trash cans.			
	No spillage.			
	Clean and clear surrounding area.			
	After pickup: • Barrels/Cans rinsed. • Barrels/Cans moved and floors cleaned.			
Paper recycling.	Boxes flat.			
	Papers tied.			
	Clean and clear surrounding area.			
Glass and plastic recycling.	Material sorted by type.			
	Clean and clear surrounding area.			

Note in the actions/comments section any item you believe to be excess, unserviceable, or obsolete.

NOTE: Keeping a record of the time checked will help identify/locate the person responsible for the discrepancy.

NON INDUSTRIAL SAFETY AND HEALTH CHECKLIST

FACILITY _____

Date _____ **Initials:** _____

Area checked	OK	Not OK	Comment
WALKING SURFACES:			
Fire exits clear, stairway and fire doors closed.			
Slippery conditions eliminated.			
Adequate aisles maintained.			
Stairways clear of materials.			
Trip hazards eliminated or identified.			
ILLUMINATION:			
Emergency lighting operational.			
Exit lights lighted/visible, batteries work.			
Lights operational guards in place.			
Burned out lights replaced/properly disposed.			
HOUSEKEEPING:			
Work areas reasonably free of debris, trash, burnable materials.			
Excess material safely stored.			
Wall units secured to the wall.			
Are eating, drinking, and smoking prohibited areas controlled.			
Coffee mess and kitchen area refrigerators clean.			
First aid kits current.			

NON INDUSTRIAL SAFETY AND HEALTH CHECKLIST (cont.)

FACILITY _____

Date _____ **Initials:** _____

Area checked	OK	Not OK	Comment
HAZARDOUS MATERIAL:			
Containers labeled as required and legible.			
Office coordinator assigned and trained.			
Minimum quantity of Hazardous Materials on hand.			
Use of Ozone depleting substances minimized.			
Office waste accumulation areas labeled if used.			
Flammable locker clearly labeled.			
NFPA fire class 2, 3, and 4 material stored in flammable locker.			
Fire extinguishers within 10 to 50 ft of flammable locker.			
ELECTRICAL:			
Panels accessible.			
Panel boxes, circuit breakers, disconnects labeled.			
Electrical outlets in good repair.			
Overload prevention extension cords only.			
Insulation on cords not cut, spliced, or damaged.			
Cords not running through doors, walls, windows.			
Exposed wires identified			
Extension cords protected from damage.			

NON INDUSTRIAL SAFETY AND HEALTH CHECKLIST (cont.)

FACILITY _____

Date: _____ **Initials:** _____

Area checked	OK	Not OK	Comment
FIRE SAFETY:			
Fire and Disaster Evacuation Plan posted and updated.			
Fire extinguishers mounted and Preventive Maintenance Schedule (PMS) checked.			
Fire extinguishers location identified.			
Area around fire alarms and extinguishers clear.			
OUTSIDE GROUNDS:			
Grounds neat and groomed.			
Hazardous materials properly stored.			
Trash cleaned up.			

WORK ORDER/MAINTENANCE STATUS

OUTSTANDING WORK ORDERS	ISSUE DATE	LAST UPDATE

OUTSTANDING MAINTENANCE (Qtr)	OVERDUE	COMPLETED

COMMENTS:

EQUIPMENT DAILY CLEANING CHECKLIST

Date:

Item	Yes	No	Completed By	Checked By	Comments
Fryer.					
Charbroiler.					
Griddle.					
Flat Top.					
Convection Oven.					
Conventional Oven.					
Salamander.					
Cheese Melter.					
Microwaves.					
Pizza Press.					
Pizza Ovens.					
Mixers.					
Slicers.					
Dish Machine.					
Refrigerator/Freezers.					
Ice Machines.					
Prep Tables.					
Sinks.					
Racks.					
Shelving.					

DISHWASHING AREA DAILY CLEANING ASSIGNMENTS		
Day	**Day Shift**	**Night Shift**
Monday	Clean outside area.	Wash walls.
	Scrub garbage cans and bus tubs.	Break down, clean, and de-scale the dishwasher.
	Hose down dumpster.	
Tuesday	Clean outside area.	Clean outside coolers.
	Hose down dumpster.	Clean pot/pan racks.
	Clean walk-ins.	
	Clean grease traps/barrels.	
Wednesday	Clean outside area.	Clean vents and light fixtures.
	Hose down dumpster.	Clean under sinks and dishwasher.
Thursday	Clean outside area.	Clean storage shelves.
	Hose down dumpster.	Clean walk-in outside walls.
Friday	Clean outside area.	Clean walk-in shelves.
	Hose down dumpster.	Scrub garbage cans and bus tubs.
Saturday	Clean outside area.	Clean walls behind sinks and dishwasher.
	Hose down dumpster.	
Sunday	Clean outside area.	Clean all floor drains.
	Hose down dumpster.	Clean under sinks and dishwasher.

FOOD PREPARATION AREA DAILY CLEANING ASSIGNMENTS		
Day	**Day Shift**	**Night Shift**
Monday	Clean reach-ins, inside and out.	Clean hood and screens.
	Organize/Tidy walk-ins.	Organize/Tidy freezers.
Tuesday	As assigned by manager.	Strip and clean microwaves.
		De-scale steam table.
Wednesday	Boil out, clean fryers, and replace oil.	Clean back of grill and broiler.
		Clean hood and screens.
Thursday	Organize/Tidy kitchen shelves.	Strip and clean convection oven.
Friday	Clean storage areas.	As assigned by manager.
Saturday	Clean all small appliances.	Clean hood and screens.
Sunday	As assigned by manager.	As assigned by manager.

SERVICE AREA DAILY CLEANING ASSIGNMENTS		
Day	**Day Shift**	**Night Shift**
Monday	Clean counter tops.	Clean fountain heads.
	Clean and stock paper products area.	Clean and stock self-service areas.
Tuesday	Clean counter tops.	De-scale and clean hot service line.
	Clean counter shelves.	Clean reach-ins, inside and out.
Wednesday	Clean counter shelves.	Clean fountain heads.
	Clean display cases.	Clean and stock self service areas.
Thursday	Clean counter tops.	De-scale and clean hot service line.
	Clean counter front.	As assigned by manager.
Friday	Clean counter tops.	Clean fountain heads.
	Clean reach-ins, inside and out.	Clean and stock self service areas.
Saturday	Clean counter tops.	Clean fountain heads.
	As assigned by manager.	As assigned by manager.
Sunday	Clean counter tops.	Clean fountain heads.
	As assigned by manager.	Clean and tidy soft drink storage area.

FREEZER STORAGE CHECKLIST

Date: _____ **Initials:** _____

Item	Yes	No	Comments/Actions
Temperatures are at 30°F (-1°C) or lower.			
All items are at least 6” off the floor.			
Items are tightly wrapped or packaged to prevent freezer burn.			
All items are labeled/dated (according to local policy).			
Items are shelved and not on floor.			
Floors and shelves are clean and orderly.			
Door seals are in good condition: • No obvious breaks, cracks. • Door closes airtight.			
Condenser has no ice build-up.			

REFRIGERATOR STORAGE CHECKLIST

Date: _____ **Initials:** _____

Item	Yes	No	Comments/Actions
Temperatures are kept between 32 - 40°F.			
Sufficient space maintained is between food items to allow for good air flow (items not touching).			
Floors are kept dry and clean.			
Drip trays are used under meats, fish, and poultry.			
Cooked items are stored on upper shelves.			
Raw meats, fish, and poultry are stored on bottom shelves.			
Raw meats, fish, and poultry are kept from touching each other.			
All items are covered and labels show item, and date and time of storage.			
Items found neat and orderly.			
Lights are working properly.			

BARTENDER'S OPENING CHECKLIST			
Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Cash bank received, counted, signed for.			
Information on specials, extra assignments, potential rush hours discussed with manager.			
Assigned keys for registers, beer kegs, etc., signed out.			
Bar set up for shift:			
• Alcohol.			
• Glassware.			
• Paper products.			
• Ashtrays.			
Requisitions completed to bring bar stock to pars.			
Garnishments prepared.			
Mixers fresh.			
Ice bins and containers filled.			
Bar top and service areas clean.			
Bar snacks fresh.			
Clean smallwares stocked in:			
• Back bar.			
• Top bar.			
• Under bar.			
Equipment in working order.			

BARTENDER'S DAILY CLEANING CHECKLIST			
Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Washed, sanitized with cold water and bleach solution, then rinsed and wiped dry:			
• Wells.			
• Sinks.			
• Bar tops.			
• Beer coolers.			
• Beer taps.			
• Ice bins.			
• Speed rack.			
Water and bleach solution poured down sink(s) and beer tap drains.			
Liquor dispenser and beer taps cleaned with a toothbrush/wire brush.			
All stainless steel doors, tops, shelving cleaned.			
All bottles wiped down.			

BARTENDER'S DAILY CLEANING CHECKLIST (cont.)

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Washed, sanitized, air dried:			
• Bar mesh.			
• Cooler mesh.			
• Mats.			
• Shakers.			
• Strainers.			
• Garnish containers.			
• Juice guns.			
• Blenders and small equipment.			
• Smallwares.			

BARTENDER'S CLOSING CHECKLIST			
Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Cash counted.			
DAR completed to include spillage, waste, comps, and information.			
Bank counted, returned, signed in.			
Cash dropped according to local policy.			
Assigned keys returned, signed in.			
Bar reset for next shift:			
• Alcohol.			
• Glassware.			
• Paper products.			
• Ashtrays.			
Daily inventory of key items completed.			
Garnishments thrown out or covered, labeled and stored.			
Mixers stored or thrown out.			
Snacks stored or thrown out.			
Ice bins and ice containers emptied and cleaned.			
Bar top and service areas cleaned.			
Garbage thrown out.			
All cleaning assignments completed.			
Empty bottles disposed of according to local policy.			
Actions and events of shift discussed with manager.			
All lights turned off.			

SERVER'S OPENING CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Customer/patron checks obtained, signed for according to local policy.			
Tabletop fliers, table tents arranged on tables.			
Clean ashtrays on tables.			
Wait station stocked.			
Chairs and stools clean and arranged neatly at tables.			
Pool tables uncovered, clean.			
Specials and promotions discussed with manager or bartender.			

SERVER'S DAILY CLEANING CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Ash trays washed.			
Service trays washed and stacked.			
Table tops and drink rails wiped down.			
Chair and stool seats, backs, and tails wiped down.			
Pool table tops brushed.			
Amusement and vending machines dusted.			
Wait station storage area cleaned.			

SERVER'S CLOSING CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Customer/patron checks turned in to bartender, signed in according to local policy.			
Empty glasses and bottles collected.			
Trash removed from tables and drink rails.			
Table top fliers and tents removed and stored.			
Ash trays removed from tables.			
Wait trays washed and stacked.			
Table tops cleaned.			
Chairs and stools cleaned.			
Chairs placed on tables.			
Stools placed on bar.			
Pool tables brushed and covered.			

BAR BACK'S OPENING CHECKLIST

Date:	Done by:		
Item	**Yes**	**No**	**Action/Comment**
Glass racks filled.			
Beer coolers stocked.			
Ice bins filled.			
Cooler temperatures recorded in log(s).			
Liquor brought up to par stock as directed by bartender.			
Bar mats and shelf netting in place.			
Trash cans lined.			

BAR BACK'S DAILY CLEANING CHECKLIST			
Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Glassware washed.			
Clean glasses returned to bar or stacking area.			
Glass defroster wiped out.			
Floor swept.			
Floor mopped with water and bleach solution.			

BAR BACK'S CLOSING CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Glass racks filled.			
Beer coolers restocked.			
Ice bins emptied.			
Cooler temperatures recorded in log.			
All areas checked for trash.			
Trash put in dumpster.			
Bottle crusher emptied.			
Returnable bottles removed from bar area.			
Storage and cabinet spaces locked and secured. (Usually done with bartender.)			

DOOR HOST'S OPENING CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Authorized users list available.			
ID tags/bands/stamps available.			
Blank incident reports available.			
Authorized customer/patron sign-in sheets available.			
Underage drinker date identified.			
Underage Users' sign-in sheets available.			
Hand counters/clickers available and working.			
Walkie-talkies working and set to correct wave length.			
Keys received and signed for (if applicable).			
Promotions and special events information reviewed.			
Event tickets and receipts available (if applicable).			
Banned list checked and reviewed.			
Metal detectors/wands available (if applicable).			
DMV ID Checking Handbook reviewed.			

DOOR HOST'S CLOSING CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Action/Comment**
Authorized Users list returned to manager.			
Unused ID tags/bands/stamps returned to manager.			
Incidents that occurred during shift recorded on incident report and turned in to manager.			
Blank incident reports returned to manager.			
Authorized customer/patron sign-in sheet given to manager.			
Underage Users' sign-in sheets given to manager.			
Hand counters/clickers given to manager.			
Customer/patron count recorded and given to manager.			
Walkie-talkies given to manager, any problems noted.			
Keys returned and signed in (if applicable).			
Event tickets and receipts given to manager.			
Banned list checked and reviewed with manager.			
Metal detectors/wands (if applicable) given to Manager.			
DMV ID Checking Handbook returned to Manager.			
No customer/patron in establishment (all spaces checked).			
No customer/patron in parking lot or surrounding area (employee cars only).			

PREVENT CUTS CHECKLIST

Date:	**Done by:**		
Item	**Yes**	**No**	**Comments/Actions**
Knives are kept sharp.			
Cutting boards are used.			
Employees are trained on correct knife handling procedures.			
Knives are not placed in sinks.			
Clean knives are stored when not in use.			
Breakable items (glassware) are kept away from the production area.			
Breakable items are not placed in sinks.			
Special containers are used for discarding broken, chipped glass.			
Nails/staples are removed when opening crates/cartons.			
Blade guards and safety devices are in place.			
Blender turned off before items being blended are put in or removed.			

EQUIPMENT WEEKLY CLEANING SCHEDULE

WEEK	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
1	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:
Dates							
2	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:
Dates							
3	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:
Dates							
4	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:
Dates							
5	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:	Assigned to:
Dates							

PREVENTIVE MAINTENANCE SCHEDULE

Facility Space or Equipment	Responsibility Assigned To	Inspection Schedule (frequency)	Maintenance Schedule (frequency)	Applicable Checklist No.	NOTES

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.4

Correct Facility/FF&E Discrepancies

DO THIS TASK WHEN

- Discrepancies are discovered during scheduled/ unscheduled Preventive Maintenance (PM) program inspections and/or maintenance of the facility and/or FF&E (Furniture, Fixtures, and Equipment).
- Discrepancies are discovered and reported by staff or customers/patrons.
- Discrepancies are discovered during the investigation of, or following a security incident.
- Discrepancies are discovered during a pre-inspection walk-through.
- Complaints are received from customers/patrons that are directly attributable to the condition of the Facility and/or FF&E.
- Anything breaks, fails, or disappears and *must* be repaired/replaced to ensure the continued operation and/or the quality of your Program.
- Discrepancies are discovered during higher-level inspections. (E.g., zone inspections, safety stand-downs/ inspections, fire inspections, assist visits, audits, I.G. inspections, standardization reviews, internal controls reviews, management reviews, etc.)

REFERENCES

- MCO P1700.27 (series), MCCS Policy Manual.
- MCO P7010.2, MCCS NAF Procurement Manual.
- Risk Management Manual.
- DoD Instruction 1015.15, Procedures for Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources.
- Local policy on inspections.
- Local policy governing maintenance and repair of facility and FF&E.

SUPPLIES/ RESOURCES

- NAVFAC 9-11014/20, Work Request.
- DD Form 1155, Order for Supplies or Services.
- NAVCOMPT Form 2213, Purchase Order.
- DD Form 1348-1, Single Line Item Requisition System Document.
- DD Form 1348-6, Single Line Item Requisition System Document.
- Local Nonappropriated Fund Purchase Request.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- When discrepancies have been repaired or replaced as necessary.
- When unserviceable, excess, or obsolete NAF and APF equipment, property and vehicles are properly disposed of as detailed in Task 8.5, Ensure Proper Disposal of APF/NAF Equipment, Property and Vehicles.

NOTES

From time-to-time you will encounter facility and FF&E discrepancies during routine operations. Likewise, your PM program inspections and maintenance will identify facility and FF&E discrepancies.

Your knowledge of your local MCCS policy on repair and maintenance of facilities/FF&E will be used to answer staff, management, and customer/patron questions regarding the condition and quality of all facets of your Program. Your responsibility is to know what you can and can NOT do to solve discrepancies. Sometimes you will find it *tough* to answer these questions in a positive, problem solving manner that ensures the customer/patron, staff member, or manager that the problem(s) will soon be solved. But, hiding behind explanations of, "well our policy is..." is an unacceptable, reactive technique that is terrible customer service!

Methods that ensure proactive management of your Program's maintenance problems include:

- Preparing written contingency plans that detail what to do when critical Program equipment, tools, machinery, supplies, vehicles, and facility spaces fall into disrepair or malfunction. (See Chapter 1, Section 3: MCCS Resourcing of MCO P1700.27 (series), MCCS Policy Manual.

NOTES (cont.)

- Having a written action plan posted that explains what actions to take immediately following the discovery of lost or stolen property. (See task 8.6, Ensure Proper Disposition of Lost/Stolen MCCS Equipment, Property or Vehicles.)
- Having a written action plan explaining what to do in the event of an unanticipated loss of a critical staff member.
- Knowing where you stand with your NAF and APF funds throughout each month, quarter and year.
- Maintaining some reserve for unanticipated/ unprogrammed maintenance/repairs/replacements.
- Ensuring an effective and up-to-date PM program for all your facility's internal and external spaces and your Program's machinery, tools, vehicles, and equipment.

CONTINGENCY PLANS

Contingency planning for an MCCS Program, business or office is a necessary and easy process.

1. Identify your Program's critical machinery, tools, vehicles, spaces, and equipment.
2. Assess what impact the loss of each of your Program's critical machinery items, tools, vehicles, spaces, and equipment would have on the Program.
3. Based on levels of impact from completely shutting down the Program, business or office to little noticeable change by the customers/patrons, decide how to PROACTIVELY respond to each loss.

Read example and continued method on next page.

CONTINGENCY PLANS (cont.)

Example: You're completely out of business as soon as your single point-of-sale system goes down.

Your contingency plans might include:

- Maintain a pre-programmed backup register/file server on hand.... and/or,
- Have a repair service on-call who is able to repair the system within a responsive, specified, and prearranged time limit... and/or,
- Develop a process to go to manual sales and accounting until the system is repaired/replaced.

4. Record, post, and distribute these contingency plans.
5. Indoctrinate staff on the contingency plans.
6. Implement contingency plans as needed.
7. Periodically review and revise the contingency plans.

SCHEDULED MAINTENANCE COSTS

This task does NOT address how to fund or accomplish *routine/scheduled* maintenance. It assumes that the outcomes of your annual budgeting includes the cost of your routine minor property replacements, servicing, contract maintenance, replenishment, and similar scheduled events. (See Task 5.1, Prepare NAF Budget Projections.)

Nor does this task explain budgeting to routinely replace capital expenditure items. You address your capital expenditure acquisition needs in your annual budget meetings and input to the MCCS Program. (See Task 3.3, Provide Short/Long-Term (5-Year) Program Management Plan Input.)

This task focuses on the details of how to respond to **UNANTICIPATED** failures, breakdowns, losses, etc.

PROCEDURE

Step 1 Decide whether or **NOT** a discrepancy needs to be corrected.

IF THE PROBLEM:	AND:	THEN:
Is so severe that the Program must be shut down.	The Program is viable, important, and should remain available to the MCCS customers/ patrons.	1. Immediately initiate steps to recover from the problem. 2. Employ contingency plans. 3. Follow the steps below.
Seriously impairs daily operations or safety.		
Endangers staff or customer/patrons.	This facility space, tool, machinery, equipment, or vehicle is absolutely necessary for the Program.	1. Warn staff/customers/ patrons of problem. 2. Ensure equipment or area is blocked off and made safe. 3. Initiate steps to recover from the problem. 4. Employ contingency plans. 5. Follow the steps below.
Bears on Program success/ operation, but will not seriously disrupt operations, endanger staff/customers/ patrons, or cause an increase in customer/patron/ staff complaints.	You will replace/repair the space, machinery, equipment, tool or vehicle in the due course of normal business operations.	1. Follow the steps below. 2. See Task 7.1, Procure Supplies, Resale Merchandise, Services, Equipment, and Property.
Has little or no bearing on Program operation/success.	You no longer need the space, machinery, equipment, tool or vehicle.	1. Use Task 8.5 to determine disposal requirements. 2. Stop here.

NOTE: Human nature tends to make us repeat that with which we are familiar and replace in kind, those things we've always had/used. Immediately replacing/repairing a defective item may not be your best management action. Think through and justify **each** replacement/repair decision!

Step 2 Based on your decision from Step 1 above, decide if it is more cost effective and Program effective to ***repair*** or ***replace*** the item.

NOTE: This decision is one that must be based on your experience, your Program, product, and equipment knowledge, and an evaluation of the situation.

For example: Decide whether it will it cost more in the long run to repair the item over and over rather than buying a new one. (Consider useful life expectancy.)

Is the shelf-life or remaining usefulness of the item too short to make repair cost effective? (E.g., adding more computer memory or needed peripherals into older model computers...; or, continuing to fix, clean, and paint your spaces rather than providing totally new decor.) Which will have more impact on the Program? (Incidentally, your decor packages should be updated periodically anyway!)

Evaluate whether customer perception and acceptance will be greater with a NEW item rather than a repaired item that works okay and safely. (For instance--how will your customers/patrons react to a repaired older golf cart that runs well but "looks" old as compared to a new cart?

Will the more costly replacement enhance safety where the more economical repair might not? (E.g., new tile, carpet, flooring, concrete vice the repairs that may not provide safe footing or eliminate trip hazards.)

IMPORTANT Always factor your customers'/patrons' perceptions, impressions, and values into your expenditure decisions and justifications.

See Task 1.4, Analyze Data/Draft Needs List (Conduct R.A.W. Tests) and Task 1.5, Prioritize Needs/Preferences for guidance on determining worth and value of various decisions and a way to prioritize your decisions.

Step 3 Determine if repair/replacement is within currently budgeted funding limits.

IF ESTIMATED REPAIR/REPLACEMENT COST:	AND:	THEN:
Is within current budget funding limits.	→	1. Repair or replace the item based on your decisions in Steps 1&2 above. 2. Follow the procurement details in Task 7.1, Procure Supplies, Resale Merchandise, Services, Equipment, and Property.
Is **NOT** within current budget funding limits.	The item MUST be repaired or replaced immediately.	1. Work with your immediate supervisor/manager to obtain additional/unprogrammed funds to repair or replace the item. 2. Use the details in Task 7.1, Procure Supplies, Resale Merchandise, Services, Equipment, and Property when funds are identified.
	Repair/replacement can be delayed until a new or mid-year budget cycle.	1. Submit as main item in next budget call or budget mid-year review. 2. Use the details in Task 7.1, Procure Supplies, Resale Merchandise, Services, Equipment, and Property when resources are in budget.

NOTE: The wide range of possibilities may make this process as simple as gaining approval by the MCCS Finance Office and the Director to needing emergency assistance from your supervisor.

- See Task 5.1, Prepare NAF Budget Projection for ideas about alternative funding sources from the MCCS Program and others.
- Successful contingency planning will minimize these potential emergencies and operational disasters--destructive acts of nature not withstanding.

Step 4 Determine who is responsible for maintenance.

IF THE MAINTENANCE ITEM:	AND:	THEN RESPONSIBILITY IS:
Is currently under warranty.	→	Vendor/supplier.
Is currently under a maintenance/ service agreement or contract.		
Is typically accomplished by Base/MCCS Maintenance.	→	Base/MCCS Maintenance.
Covered by a current Memorandum of Agreement (MOA) between MCCS and Base Maintenance.		
Is within the scope and skill levels of your staff.	Is a repair or maintenance procedure typically accomplished by your staff.	Your staff.
Is within the scope and skill levels of the Base/MCCS Facilities Maintenance Section.	Is a repair or maintenance procedure typically accomplished by the Facilities Maintenance Section.	MCCS Facilities Maintenance Section.

NOTE: Guidance detailing who is responsible for each maintenance requirement will come from your immediate supervisor or from the MCCS Director and Chief Financial Officer (CFO).

Repairs and replacements required by Category "A" and "B" MWR Programs use appropriated funds (APF). Repairs and replacements required by the CAT "C" businesses use nonappropriated funds (NAF) except for replacement and repair of those items assignable to *"protection of health and safety"*. (E.g., fire protection, sprinkler and alarm systems, security protection, pest control, sewage disposal, trash and garbage removal, snow removal, safety, medical, sanitation, and veterinary inspections, rescue operations, and facility repair necessary to ensure integrity and external appearance of buildings including electrical, mechanical, roofing, foundations, windows, doors, or to correct fire and safety deficiencies. IF these costs are additional and identifiable, they are funded by MWR using NAF. Reference DoDI 1015.15, Procedures for Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources.)

Step 5 Determine what to do next based on whether you decided above to replace the item or repair it.

IF YOU DECIDED TO:	THEN:
Replace the item.	Complete Step 6.
Repair the item.	Complete Step 7.

Step 6 Initiate purchase procedures for replacement items or vendor services.

- ☐ Complete a purchase request and forward per local policy.
- ☐ Use Task 7.1, Procure Supplies, Resale Merchandise, Services, Equipment, and Property.
- ☐ Note the date you prepared and forwarded the purchase request in your purchase log, daily-things-to-do list or other tickler file.
- ☐ Stay on top of the procurement until you receive the replacement item(s) or vendor services. Ask for an estimated delivery/completion date--challenge delays.
- ☐ Complete the applicable receiving documents when you receive the replacement item(s) or vendor services.
- ☐ Forward and file all applicable procurement and equipment paperwork.

NOTE: You may have to identify available sources of supply to ensure timely and economical procurement and to get the correct replacement item needed for your Program. Consider the following:

- Existing procurement records.
- Known sources.
- Vendor/supplier recommendations.
- Information from your colleagues, manager, MCCS, MR, etc.

Step 7 Based on your decisions in Steps 1 through 4 above, direct applicable repair action.

IF REPAIR IS ACCOMPLISHED BY:	THEN:
Your staff.	1. Acquire necessary repair parts and supplies. 2. Observe all applicable safety precautions and regulations. 3. Accomplish the repairs in accordance with manufacture's guidance, if any. **-OR-** 4. Follow procedure for repairs per local policy, if any.
The MCCS Facilities Maintenance Section.	1. Prepare and route work order per local policy. 2. Note day submitted in your daily-things-to-do list or other tickler file. 3. Stay on top of the system until the repairs are satisfactorily accomplished.
Base/MCCS Maintenance.	
Vendor or service/repair company under warranty, service agreement, or maintenance contract.	1. Contact vendor by phone, e-mail, fax, or letter per local policy. 2. Note day submitted in your daily-things-to-do list or other tickler file. 3. Stay on top of the vendor until the repairs are satisfactorily accomplished.
Vendor or service/repair company **NOT** currently under warranty, service agreement, or maintenance contract.	1. Initiate a purchase request per local policy. 2. See Task 7.1, Procure Supplies, Resale Merchandise, Services, Equipment, and Property.

See notes on next page.

Step 7 (cont.)

NOTE: This work may be routine or an emergency. Depending on the type of service or maintenance required, your work order may be written, electronic, or telephonic. Check with your immediate supervisor or MCCS/Base Maintenance for information to include on the work order. (E.g., estimated number of man-hours required to perform work, material costs, approximate response time, etc.)

You may have to identify available sources for timely and economical maintenance/repair services. Consider the following:

- Known repair services/centers.
- Documentation from similar past maintenance actions.
- Vendor/supplier recommendations.
- Existing contracts with MCCS activities.
- Information from your colleagues, manager, MCCS, MR, etc.

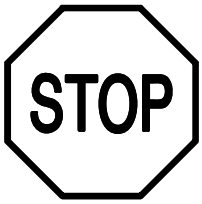
Step 8 Inspect the completed work.

IF WORK IS:	THEN:
Satisfactory.	1. Sign the service agency's documentation if any presented/ requested. 2. Sign and forward any applicable local service orders, purchase documents, etc. 3. Notify your immediate supervisor if in accordance with your local procedures.
NOT Satisfactory.	1. Notify your immediate supervisor of the problem. 2. DON'T sign the service agency's documentation until the problem is resolved. **-OR-** 3. Document the existing or new problem on the service agency's documentation if any was presented/requested. 4. Follow up as necessary.

NOTE: The details of what to do if a repair is not satisfactory immediately following repairs or during the warranty period can span from the very simple to requiring court action.

Always get advice from your immediate supervisor on your local procedures for accepting or rejecting work. He or she may have to communicate the details and history of the problem with MCCS Support, Base Maintenance, Legal, (MR), or Headquarters as required by the magnitude of the problem.

It is important, on the more long-term and expensive jobs that you observe progress, keep notes, and keep key players informed.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.5

Ensure Proper Disposal of NAF/APF Property, Equipment and Vehicles

DO THIS TASK WHEN

- Notified by the MCCS Director/AC/S of the need to (or approval for) transfer or disposal of MCCS Program property, or abandoned/lost personal property.
- Deficiencies/discrepancies are discovered during scheduled preventive maintenance (PM) that result in MCCS Program property items being declared excess, unserviceable, obsolete, or abandoned/lost personal property.
- Deficiencies/discrepancies are discovered and reported by staff or customers/patrons that result in property items being declared excess, unserviceable, obsolete, or abandoned/lost personal property.
- Deficiencies/discrepancies are discovered during a pre-inspection walk-through that result in property items being declared excess, unserviceable, obsolete, or abandoned/lost personal property.
- Deficiencies/discrepancies are discovered during the investigation of, or following a security incident that require disposal of damaged property.
- Complaints are received from customers/patrons that are directly attributable to the condition of the facility and/or FF&E and result in your Program property items being declared excess, unserviceable, or obsolete.

DO THIS TASK WHEN (cont.)

- Deficiencies/discrepancies are discovered during higher level inspections that result in your Program property items being declared excess, unserviceable, obsolete, or abandoned/lost personal property.

REFERENCES

- MCO P1700.27 (series), MCCS Policy Manual.
- DoD 7000.14-R, Department of Defense Financial Management Regulations, Vol 13.
- NAVFAC P-300, Management of Civil Engineering Support Equipment.
- DoD 4500.36, Management, Acquisition, and use of Motor Vehicles.
- DoD 4160.21, Defense Disposal Manual.
- Local policy on HAZMAT.
- AXS-ONE System.
- Local standard operating procedures (SOPs).

SUPPLIES/ RESOURCES

- NAVCOMPT Form 2212, Certificate of Disposition.
- DD Form 1348-1, DoD Single Line Item Release/ Receipt Document.
- NAVCOMPT Form 2211, Daily Activity Report (DAR).
- DD Form 1149, Requisition and Invoice/Shipping Document.
- NAVCOMPT Form 745, Custody Receipt Record.
- NAVCOMPT Form 742, Consolidated Property Record.
- NAVCOMPT Form 742-1, Stock Record Card.
- DD 1342, DoD Property Records.
- SF-97, Government Certificate of Release.

THIS TASK IS DONE CORRECTLY WHEN

- Required documentation is complete and signed.
- All property is transferred or properly destroyed and disposed.
- MCCS Director/AC/S is notified of vehicles/special purpose vehicles requiring disposition action.
- All monies are correctly handled and accounted.
- Excess property is recycled to the benefit of the Marine Corps MCCS/APF system.
- All property is removed from inventory and internal control records.

NOTES

This task is separated into the following three parts.

Disposal of:

1. APF property.

2. NAF property.

3. Abandoned personal property.

Although always a good management practice, it is very important during constrained financial times that we ensure all excess property is removed from inventories, storerooms, and warehouses. In so doing, the expense of inventorying and storing is minimized and the fund benefits when the excess APF/NAF property is sold or redistributed.

Holding onto excess/unserviceable property is a cost to your Program. Your costs may include time spent on controls, repeat inventorying, depreciation, and the potential for loss/ theft. Timely disposal of excess property will allow you to recoup the maximum value, especially if the property is to be sold/traded.

Every possible effort should be made to rehab and reuse property that is excess and serviceable rather than just automatically "tossing" it--we must always be exacting and trustworthy stewards of the Marine's and taxpayer's investments (NAF & APF)! Your excess property may be some other manager's dream come true and vice-versa!

PROCEDURE

Step 1 Review your local MCCS SOPs and instructions that detail how to dispose of NAF/APF property, equipment, and vehicles.

This information should:

- Prepare you to take timely and appropriate action.
- Give you information to ensure appropriate staff response/actions.
- Give you information to review, revise, and improve your Program SOPs for this task.
- Give you information to train new staff members and prepare local policy and procedure for your Program.
- Inform you and your staff of controls/procedures to minimize property losses.

Step 2 Confirm that the equipment/property being considered for disposal is one of the following:

☐ Excess to needs. No replacement needed or trade requested.

☐ Unserviceable--beyond economical repair.

☐ Obsolete--beyond economical upgrade and is no longer useful to its original design or intended end use. Replacement or trade may or may not be needed.

☐ Determine original acquisition method. If undeterminable, then dispose of the property as if it were acquired with APF.

Step 3 Determine appropriate disposition procedures to follow based on type of property.

IF:	THEN:
The excess property was purchased with APF.	Transfer property to supply office/ Defense Reutilization and Marketing Office (DRMO). Complete Steps 4-10.
The funding source is unidentifiable, it is treated as APF property.	
Your MCCS organization is **NOT** authorized to process property dispositions.	
The excess property was purchased with NAF.	Complete Steps 11-21.
The property is unserviceable/obsolete.	Go to step 22.
The property is abandoned personal property.	Go to Step 23.

NOTE:	If dealing with lost/stolen property, go to Task 8.6, Ensure Proper Disposition of Lost/Stolen Property, Equipment, or Vehicles.

APF EQUIPMENT DISPOSAL

Step 4 Prepare a request for disposal of APF property using a NAVCOMPT Form 2212, Certificate of Disposition or similar local form. (See example after page 8.5.22.)

Step 5 Forward the request to your immediate supervisor for review, forwarding and authorization by the MCCS Director.

- The Business/Property Office typically prepares a DD Form 1348-1, DoD Single Line Item Release/Receipt Document for the MCCS Director's signature.
- By signing the 1348-1, the MCCS Director/property officer approves the transfer of the excess property.

Step 6 When the disposal paperwork is returned to you, forward the signed 1348-1, Single Line Item Release/Receipt Document and the property to be disposed of to the supply office or DRMO.

NOTE:	Call ahead to coordinate the details with your APF Property Office.

Step 7 Coordinate the transfer of the equipment with the supply office or DRMO to make sure they will accept the item(s). (APF property **cannot** be transferred directly to NAF Cat "C" Programs.)

☐ Follow their procedures.

- Follow all requirements and procedures for handling, storing and moving/shipping for:
  - Hazardous materials (HAZMAT).
  - Computers. (All hard drives are to be "crashed"!)
  - Fragile equipment.
  - Dates & times.
  - Pickup/delivery.

☐ Contact your immediate supervisor and/or MCCS Director via your chain of command.

Step 8 Verify the property control office has been notified of property disposition so control records can be adjusted.

Step 9 Follow-up with the MCCS Finance/Property Office to ensure the disposed property has been removed from your APF property records.

Step 10 Retain copies of all paperwork for future reference.

- DD Form 2212
- DD Form 1348, etc.

Stop here!
You have completed the steps for APF Property Disposal.

NAF EXCESS PROPERTY (EQUIPMENT) DISPOSAL

Step 11 Assess the condition and value of the excess property, considering the following:

- ☐ Can you justify why the item/property is excess to your needs?
- ☐ What is its condition?
  - Is it still functional?
  - Is it functional, but in need of some minor and economical repair/refurbishment?
  - Or, is it **NOT** worth repairing with regard to your Program, but still of some cash value or usefulness to someone else?
- ☐ Gather and review all applicable records, history, and paperwork.
- ☐ Ask the MCCS Finance Office to describe the financial impact, if any, of writing-off this item. (Depreciation.)
- ☐ Use your professional network to determine:
  - The range of its value and usefulness.
  - Who might be interested in it.
  - Whether it is obsolete or nearly so.

Step 12 Based on the above assessment, decide, in the order listed below, which of the following you would recommend be done with this property.

IF YOU COULD:	THEN:
Continue to use it in your Program.	1. Stop here.
Use in another Program within your MCCS Program.	1. Transfer the property.
Use as trade-in for purchase of like replacement item(s).	1. Trade-in the property.
Communicate with Headquarters (MR) for use at another Marine Corps command.	1. Accomplish the communications and if the property can be used elsewhere, transfer it.
Use appropriate and authorized disposal methods to recover costs.	1. Dispose of the property and recover costs. • Use Sealed bid method. (Property can fall in any value range.) • Use the garage sale method. (These can be conducted as frequently as the MCCS director deems necessary to efficiently dispose of excess NAF property and only applies to property with an original acquisition cost of $1000 or less.)
Transfer to DRMO for salvage.	1. Complete DRMO transfer procedures. 2. Transfer the property to DRMO.

Step 13 Notify your immediate supervisor that you have excess property and explain the following:

- ☐ Why it is excess to your Program.
- ☐ Its history.
- ☐ Its condition.
- ☐ Its value.
- ☐ Financial impact of disposal.
- ☐ Your recommendation for the property's disposition.

Step 14 Based on Steps 11 - 13 above, ask your immediate supervisor to tell you the most appropriate disposal action for your excess NAF property.

NOTE:	It is always in your best interest to recover your costs first, then reuse equipment within your or another MCCS Program. Always try to get the maximum benefit for your Program...trade in toward purchase or get cash for your excess stuff. Your immediate supervisor will get guidance from the MCCS Director and/or the Finance Office as to the most appropriate disposal method. You will be advised by the MCCS Director, AC/S to turn in UNSERVICEABLE excess NAF. (See Step 20.) MCCS will notify Headquarters (MRG) when NAF vehicles are declared excess, sold, or transferred to DMRO. **In no instances shall property be donated to any individual or any civilian organization.**

Step 15 Based on the directions from your immediate supervisor, complete the appropriate disposal steps for your excess property. See table below:

IF DISPOSAL DIRECTIONS WERE:	THEN:
Transfer within your own MCCS Program.	Go to step 16.
Trade-in for like item.	Go to step 17.
Transfer to another MCCS Program.	Go to step 18.
Sell in sealed bid sale.	Go to step 19.
Sell at garage sale.	Go to step 20.
Turn in to DRMO.	Go to step 21.

Step 16 Transfer the excess property ***within*** your own MCCS Program.

☐ Communicate and coordinate the actual transfer date, time, and delivery method(s) with the receiving manager/supervisor.

☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

- Use NAVCOMPT Form 742, Property & Depreciation Record, if applicable.

Step 17 Process the excess property as a "TRADE-IN" against a like item. (E.g., mowers, tractors, vehicles, machinery, etc.)

- ☐ Prepare the NAVCOMPT Form 2212, Certificate of Disposition, ensuring that "Trade-In" is annotated in the "Reason For Disposition" column. (See example after page 8.5.22.)

- ☐ Ensure you have evidence dealer received item. (E.g., signature, stamp, receipt/transfer docs, etc.)

- ☐ Ensure evidence of the agreed upon monetary value of the trade-in item is indicated or attached to the new item invoice/sales documents.

- ☐ Forward the NAVCOMPT Form 2212, Certificate of Disposition, for the MCCS Director's and Commanding Officer's signature.

  - The Business/Property Office typically prepares a 1348-1, DoD Single Line Item Release/Receipt Document for the MCCS Director's signature.

  - The MCCS Director signs the completed DD Form 1348 to authorize transfer of the excess property.

- ☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

Step 18 Transfer the excess property to another MCCS Program.

- ☐ Communicate and coordinate the actual transfer date, time, and delivery method(s) with the receiving MCCS Program.
- ☐ Ensure receiving activity pays transportation/shipping costs.
- ☐ Provide applicable property data to your MCCS Financial/Property Office so that they can process the documentation to transfer this excess property to the receiving MCCS Program.
- ☐ Prepare and forward the Certificate of Disposition (NAVCOMPT Form 2212) for the MCCS's and Commanding Officer's (CO's) signatures.
  - The Business/Property Office typically prepares a 1348-1, DoD Single Line Item Release/Receipt Document for the MCCS Director's signature.
  - The MCCS Director signs the completed DD Form 1348 to authorize transfer of the excess property.
- ☐ Ensure Requisition and Invoice/Shipping Document (DD Form 1149) is annotated and signed by receiving activity.
- ☐ Coordinate or assist as applicable in the actual transfer of the property.
- ☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

Step 19 Dispose of the excess property by a "sealed bid" sale. (These type sales are typically done in concert with other MCCS Programs.)

- ☐ Ensure you have a Title or a Certificate of Origin for vehicles, boats, campers and trailers, etc., or, if not, use SF-97, U.S. Government Release of Motor Vehicle. (See sample at end of task.)
- ☐ Prepare your local form/memo for disposal of excess property by "sealed bid" sale.
- ☐ Forward this form or memo for review and signature by the MCCS Director and Commanding Officer.
- ☐ Ensure your form/memo includes the following wording, "This/these item(s) of property will be sold by sealed bid sale."
- ☐ Determine a "fair market" value and set a sale limit.
- ☐ Prepare the excess property for examination by potential bidders.
- ☐ If assigned by your immediate supervisor, monitor bidding procedure to ensure compliance with policy:
  - Allow appropriate amount of time for eligible bidders to screen items.
  - Bidders must be persons authorized to use MCCS Programs and facilities.
  - Close all bidding at a preset date/time.
- ☐ After the sealed bids have been opened and the successful bidder identified/ notified, prepare the NAVCOMPT Form 2212, Certificate of Disposition, ensuring that "Sealed Bid Sale" is recorded in the "Reason For Disposition" column and other supporting documents are attached.
- ☐ Forward the NAVCOMPT Form 2212, Certificate of Disposition, for the MCCS Director's and Commanding Officer's signature.
- ☐ Ensure NAVCOMPT Form 2211, Daily Activity Record (DAR) reflects money received from sale.
- ☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

NOTE: If the highest bidder backs out before the completion of the sale, revert to the next highest bid.

If the request for bid includes a requirement for a deposit, it should be stated as non-refundable. If a bidder backs out of an accepted bid, his/her deposit is forfeited.

If not sold, hold the property for future sale or other disposal method.

Step 20 Dispose of the excess property by a sale at a garage sale. (These type sales are typically done in concert with other MCCS Programs.)

☐ Ensure this disposal method is accomplished in accordance with the following:

IF:	THEN:
Any individual item of your excess MCCS equipment initially cost MORE than $1000 and useful life of two or more years.	1. You **CANNOT** dispose of the item using the garage sale method. 2. You must use a sealed bid or other disposal method. 3. Return to the table in Step 15.
Each of your excess property items acquisition cost $1000 or **LESS** and life expectance of less than two years.	1. You CAN dispose of the item using the garage sale method. 2. Continue with the items below this table.

☐ Ensure you have the MCCS Director's authorization to sell the property by the garage sale method. These can be conducted as frequently as the MCCS director deems appropriate to efficiently dispose of excess NAF property.

☐ Ensure proper cash handling and sales procedures are used during the selling process. (See Task 5.6, Control Receipts and Cash.)

- Ask related businesses, service reps, dealers, etc., to determine "fair" market value.
- Affix price tag to each item.

☐ After the garage sale prepare the NAVCOMPT Form 2212, Certificate of Disposition, ensuring that "Garage Sale" and sales information is recorded in the "Reason For Disposition" column and other supporting documents are attached.

☐ Forward the NAVCOMPT Form 2212, Certificate of Disposition, for the MCCS Director's and Commanding Officer's signature.

☐ Ensure NAVCOMPT Form 2211, Daily Activity Record (DAR) reflects money received from sale.

☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

☐ Complete Step 21 for all items not sold during the garage sale.

Step 21 Process disposition of excess property for turn-in to supply office or the DRMO office.

☐ Prepare the NAVCOMPT Form 2212, Certificate of Disposition, ensuring that, "This/these item(s) of property will be turned in to DRMO" is recorded in the "Reason For Disposition" column and other supporting documents are attached.

☐ Forward the NAVCOMPT Form 2212, Certificate of Disposition, for the MCCS Director's and Commanding Officer's signature.

- The Business/Property Office typically prepares a 1348-1, DoD Single Line Item Release/Receipt Document for the MCCS Director's signature.
- The MCCS Director signs the completed DD Form 1348 to authorize transfer of the excess property.

☐ Make sure the DRMO has the space available to receive the property to be turned-in. (You may have to retain item(s) until space is available.)

☐ Ensure DD Form 1348-1, DoD Single Line Item Release/Receipt Document contains the following citation:

"I certify that the property was procured from nonappropriated funds (NAF). Proceeds received will be payable to:

(name)	**MCCS Director**
(organization)	
(address)	

☐ Ensure you obtain an annotated and signed copy of DD Form 1348-1, DoD Single Line Item Release/Receipt Document from DRMO.

☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

NOTE: Send a memo or DD Form 1342 to the MCCS Director when disposing of special purpose vehicles. (Vehicles designed for uses other than on highways. (E.g., tractors, mowers, Pargo carts, vacuums, etc.) Describe disposal method, date, and property #.

Stop here!
You have completed the steps for NAF Property Disposal.

UNSERVICEABLE/OBSOLETE PROPERTY

Step 22 Complete disposition actions for **unserviceable/obsolete** property.

IF:	THEN:
Any individual item of your unserviceable/obsolete MCCS equipment initially cost MORE than $1,000.	1. You can **NOT** directly dispose of that item. 2. You must transfer that item to DRMO using the procedure below.
Each of your unserviceable/ obsolete property items cost **LESS** than $1,000.	1. You can dispose of the item(s) locally. 2. You must have two disinterested witnesses who are **NOT** property custodians observe your destructive disposal. 3. Have the two witnesses verify in writing that they observed the disposal. (Typically recorded on the Certificate of Disposition.) 4. Retain a record copy of the disposal documentation.

☐ Prepare the NAVCOMPT Form 2212, Certificate of Disposition, ensuring that, "This/these item(s) of unserviceable/obsolete property will be turned in to DRMO" is recorded in the "Reason For Disposition" column and other supporting documents are attached.

☐ Forward the NAVCOMPT Form 2212, Certificate of Disposition, for the MCCS Director's and Commanding Officer's signature.

☐ Make sure DRMO has the space available to receive the property to be turned-in. (You may have to retain item(s) until space is available.

☐ Ensure DD Form 1348-1, DoD Single Line Item Release/Receipt Document contains the following citation:

"I certify that the property was procured from nonappropriated funds (NAF). Proceeds received will be payable to:

(name)	**MCCS Director**
(organization)	
(address)	

☐ Ensure you obtain an annotated and signed copy of DD Form 1348-1, DoD Single Line Item Release/Receipt Document from DRMO.

☐ Follow-up with your MCCS Finance/Property Office to ensure your property records are changed to reflect the changed property accountability.

ABANDONED/LOST PERSONAL PROPERTY

Step 23 Determine timing for disposition procedure for Abandoned Personal property. (Principally cars, trucks, vans, boats, trailers, etc.)

IF PROPERTY VALUE IS :	THEN:
$1,000 or less.	1. Hold until you are satisfied the property is truly abandoned/lost. 2. Once satisfied, disposal is authorized.
More than $1,000.	1. Hold for 45 days for owner to reclaim the property. 2. Move to a designated storage point on the installation. 3. Hold at designated storage point for 45 additional days. 4. Disposal is authorized.

Step 24 Dispose of abandoned personal property. (Use the following checklist to ensure monies are handled properly.)

NOTE: MCO P1700.27 (series) MCCS Policy Manual provides guidance on disposition of abandoned property. Be clear on all the legal ramifications before disposing of abandoned property.

In all cases, communicate with every MCCS Program that may have an interest.

These may include:

- DRMO.
- MCCS Finance/Property Office.
- Legal office.

Get everything in writing when dealing with other Programs/activities.

Follow local procedures if in place. If no SOP is available, help prepare one. (See Task 9.3, Develop Internal Policies/Procedures (SOPs).

☐ All costs incurred to dispose of property are documented.

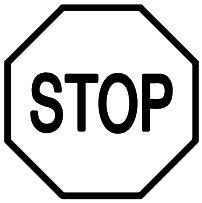
☐ Only documented and directly related costs are retained from proceeds of sale(s).

☐ All proceeds greater than related costs are forwarded to the U.S. Treasury.

☐ Proceeds from one item are not used to offset costs of another item(s).

☐ All documentation is kept on file for 5 years.

NOTE: 10 USC requires that proceeds be available for claims by owners and their heirs after the property is sold. Thus, any proceeds retained are subject to reclamation by the U.S. Treasury to honor claims for up to 5 years after disposal of the item.



Congratulations! You've completed this task.

EXAMPLE

CERTIFICATE OF DISPOSITION
NAVCOMPT FORM 2212 (10-71)

ACTIVITY NAME/LOCATION: **MCB Camp Pendleton**

DATE: 2 Jul YR | SHEET: 1 | OF: 1

DESCRIPTION OF ITEM	UNITS	UNIT COST	TOTAL VALUE	REASON FOR DISPOSITION
21” Zenith Color TV	3	$410	$1230	Obsolete (Trade in $375 toward $1700 big screen RCA)
Pargo Cart	1	$2375	$2375	Transferred to MCLB Barstow
Forge Walk-in Refrigerator	1	$7500	$7500	Broken beyond economical repair. APF Turned in to DRMO

SIGNATURE OF MESS TREASURER/CUSTODIAN OF RECREATION FUND

Mark Anderson

Mark Anderson, MCCS Dir.

APPROVED BY COMMANDING OFFICER

Phil P. Wilson, III

Capt Phil P. Wilson, III, USMC

S/N 0104-LF-706-5250

SAMPLE

THE UNITED STATES GOVERNMENT
CERTIFICATE OF RELEASE OF A MOTOR VEHICLE

(See instructions on reverse)

Certificate No.

The undersigned DEPARTMENT or AGENCY of the UNITED STATES GOVERNMENT certifies that the motor vehicle described herein, the property of the United States Government, has been transferred this _____ day of _____ 20 ____, to the Transferee designated herein; and that this is the first transfer of such vehicle in ordinary trade and commerce subsequent to acquisition thereof by the UNITED STATES GOVERNMENT.

TRANSFEREE *(Name of dealer, individual, etc.)*	ADDRESS OF TRANSFEREE *(Please include ZIP code)*

TRANSFEROR (Accountable Office; i.e., department or agency; sub-units and address, including ZIP code)

MAKE OF VEHICLE	YEAR	SERIES OR MODEL	ENGINE NO.	MANUFACTURER'S SERIAL NO.

TYPE OF VEHICLE *	KIND OF BODY ‖

NUMBER OF CYLINDERS	HP.(SAE) †	FUEL	NUMBER OF AXLES	NUMBER OF DUAL WHEELS ǀ	TIRES ☐ SOLID ☐ PNEUMATIC

WEIGHT (Shipping)	NO. OF PASSENGERS ǀ	WHEELBASE ǀ	MANUFACTURER'S RATED CAPACITY	SALE PRICE

ODOMETER MILEAGE STATEMENT

Federal Regulations require you to state the odometer mileage upon transfer of ownership. An inaccurate or untruthful statement may make you liable for damages to your transferee, for attorney fees, and for civil or criminal penalties, pursuant to Sections 409, 412, and 413 of the Motor Vehicle Information and Cost Savings Act of 1972 (Public Law 92-513, as amended by Public Law 94-364). I, _____ state that to the best of
my knowledge, based upon United States Government records, the odometer of the vehicle described above reads
_____ miles/kilometers.

CHECK ONE BOX ONLY:

☐ 1. I HEREBY CERTIFY that to the best of my knowledge, the odometer reading stated above reflects the actual mileage of the vehicle described above.

☐ 2. I HEREBY CERTIFY that to the best of my knowledge, the odometer reading stated above reflects the amount of mileage in excess of designed mechanical odometer limit of 99,999 miles/kilometers of the vehicle described above.

☐ 3. I HEREBY CERTIFY that to the best of my knowledge, the odometer reading stated above is not the actual mileage of the vehicle described above and should not be relied upon.

CHECK ONE BOX ONLY:

☐ 4. I HEREBY CERTIFY that to the best of my knowledge, the odometer of said vehicle was not altered, set back, or disconnected while in my possession and I have no knowledge of anyone else doing so.

☐ 5. I HEREBY CERTIFY that to the best of my knowledge, the odometer was altered for repair or replacement purposes while in my possession, and that the mileage registered on the repaired or replacement odometer was identical to that before such service.

☐ 6. I HEREBY CERTIFY that to the best of my knowledge, the repaired or replacement odometer was incapable of registering the same mileage, that it was reset to zero, and that the mileage on the original odometer or the odometer before repair was _____ _____.

SIGNATURE OF TRANSFEROR'S (Seller's) REPRESENTATIVE	Title	Date

Signature or Transferee (Buyer)	Date

* Automobile, station wagon, ambulance, truck-motor or tractor, trailer, semi-trailer, motor scooter, etc.

ǀ Automobile-coupe, two- or four-door sedan, truck-pickup, panel, van, cargo, stake, platform, trailer-pole, dolly, cable reel, bogie, tank (give capacity), etc.

‖ Where applicable. See Instructions on reverse.

STANDARD FORM 97. (Rev 7-79)
Prescribed by GSA FPMR (41 CFR) 101-38-701
Previous Edition Not Useable

INSTRUCTIONS

1. This certificate or release, to include the Odometer Mileage Statement, constitutes an official transfer of the vehicle described hereon, and formally evidences its release from the custody of the United States Government to the designated transferee.

2. The filing of this certificate shall be governed by the requirements of applicable local law.

3. The information required on the Certificate of Release, to include the Odometer Mileage Statement, shall be furnished in all applicable transactions. An incomplete form, particularly an inadequate description, may delay the issuance of a State title.

4. All certificate and copies shall be numbered consecutively by the using agency, such numbers to be typed or overprinted on all copies in the certificate number space provided.

5. The completed certificate, to include the Odometer Mileage Statement, shall be available to the transferee concurrently with the release of the vehicle.

6. Items of description, designated by a double dagger, are to be used **only** where applicable. They do not apply to **all** types of vehicles. Examples are as follows: number of dual wheels applies only to trucks; SAE horsepower, wheel-base, and engine number are required by some States; number of passengers applies only to motor bus capacity; etc.

DoD PROPERTY RECORD	1. ☐ Active ☐ Initial ☐ Idle ☐ Change	2. Julian Date	3. I.D./Government Tag No.	Form Approved OMB No. 22-R0209

SECTION I - INVENTORY RECORD

4. COMMODITY CODE	5. STOCK NUMBER	6. ACQUISITION COST	7. TYPE CODE	8. YR OF MFG	9. POWER CODE	10. STATUS CODE	11. SVC CODE	12. COMMAND CODE	13. ADM OFFICE CODE

14. NAME OF MANUFACTURER	15. MFR'S CODE	16. MANUFACTURER'S MODEL NO.	17. MANUFACTURER'S SERIAL NO.

18. LENGTH	19. WIDTH	20. HEIGHT	21. WEIGHT	22. CERTIFICATE OF NON-AVAILABILITY NUMBER	23. PEP NO.	24. ARD	25. CONTRACT NO.

26. DESCRIPTION AND CAPACITY

CONTINUED ON REVERSE SIDE ☐ YES ☐ NO

27. ELECTRICAL CHARACTERISTICS

QUANTITY	HORSEPOWER	VOLTS	PHASE	CYCLE	AC	DC	SPEED	TYPE AND FRAME NUMBER

28. PRESENT LOCATION	28a. DIPEC CONTROL NO.
	29. POSSESSOR CODE

SECTION II - INSPECTION RECORD

		YES	NO			YES	NO
30. CAN ITEM BE STORED ON SITE AND MAINTAINED FOR AT LEAST 12 MONTHS?				42. MUST ITEM BE REPAIRED/REBUILT/OVER HAULED TO PERFORM ALL FUNCTIONS?	$		
31. HAS ITEM BEEN REBUILT/OVERHAULED? IF SO, WHEN?	DATE :			43. DO QC RECORDS INDICATE SATISFACTORY PERFORMANCE? IF NO, EXPLAIN UNDER REMARKS BELOW.			
32. HAS ITEM BEEN MODIFIED FROM ORIGINAL CONFIGURATION? IF SO, EXPLAIN UNDER REMARKS BELOW.				44. ARE MANUALLY OPERATED MECHANISMS IN WORKING ORDER? IF NO, DESCRIBE UNDER REMARKS BELOW.			
33. WAS ITEM INSPECTED UNDER POWER? IF NOT, EXPLAIN UNDER REMARKS BELOW.				45. ARE SCALES, DIALS AND GAUGES WORKING AND READABLE? IF NO, DESCRIBE UNDER REMARKS BELOW.			
34. ARE MAINTENANCE COSTS NORMAL? IF NOT, EXPLAIN UNDER REMARKS BELOW.				46. ARE HYDRAULIC PUMPS, VALVES, AND FITTINGS OPERATING PROPERLY? IF NO, DESCRIBE UNDER REMARKS BELOW.			
35. ARE SAFETY DEVICES ADEQUATE AND SATISFACTORY? IF NOT, EXPLAIN UNDER REMARKS BELOW.				47. ARE ELECTRONIC SYSTEMS AND CONTROLS OPERATING PROPERLY? IF NO, DESCRIBE UNDER REMARKS BELOW.			
36. ARE INSTALLATION INSTRUCTIONS AVAILABLE FOR TRANSFER?				48. HOW MANY HOURS WAS ITEM USED BY CURRENT POSSESSOR?			
37. ARE OPERATING INSTRUCTIONS AVAILABLE FOR TRANSFER?				49. EXPLAIN UNDER REMARKS LAST USE OF EQUIPMENT DESCRIBED IN ITEM 26 ABOVE.			
38. WAS ITEM USED ON A FINISHING OPERATION?				50. ESTIMATED COST FOR PACKAGING, CRATING, HANDLING.	$		
39. WILL ADJUSTMENTS OR CALIBRATION CORRECT DEFICIENCIES?				51. INDICATE DATE ITEM WILL BE AVAILABLE FOR REDISTRIBUTION.	$		
40. IS ITEM SERVICEABLE WITHOUT DAMAGE TO COMPONENTS? IF NOT, GIVE THEIR REPLACEMENT COSTS.	$			52. CONDITION CODE.	$		
41. IS ITEM IN OPERABLE CONDITION?				53. OPERATING TEST CODE.	$		

SECTION III - REMARKS

54. REMARKS:

CONTINUED ON REVERSE SIDE ☐ YES ☐ NO

SECTION IV - DISPOSITION RECORD

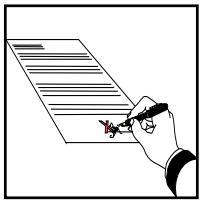
55. CONSIGNEE (NAME AND ADDRESS INCLUDING ZIP CODE)	56. TYPE OF DISPOSITION ☐ DONATION ☐ DESTRUCTION ☐ SALE ☐ ABANDONMENT	56a. DATE OF DISPOSITION AND PROCEEDS IF SOLD

SECTION V - VALIDATION RECORD

57. VALIDATION (TYPED NAME(S) AND SIGNATURES(S))

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.6



Ensure Proper Disposal of Lost/Stolen Property, Equipment or Vehicles

DO THIS TASK WHEN

- Notified of missing equipment, property, vehicles or supplies.
- Notified by anyone suspecting any MCCS/Marine Corps item is lost or stolen.
- Equipment, property, vehicles, or supplies are discovered missing as a result of immediate or recent observation or during a scheduled/non-scheduled inspection or inventory.

REFERENCES

- DoDI 7000.14-R, Department of Defense Financial Management Regulations, Vol 13**.**
- MCO P1700.27 (series), MCCS Policy Manual.
- SECNAVINST 1700.12 (series), Operation of Morale, Welfare, and Recreation Activities.
- Risk Management manual.
- SECNAVINST 5500.4 (series), Reporting of Missing, Lost, Stolen, or Recovered Government Property.

REFERENCES (cont.)

- Local station instructions and MCCS standard operating procedures (SOPs).

SUPPLIES/ RESOURCES

- Security Report of Investigation/Incident Report.
- NAVCOMPT FORM 2212 - Certificate Of Disposition.
- Computerized/paper property control records.
- Computer with word processor software.

THIS TASK IS DONE CORRECTLY WHEN

- Losses are reported within specified time limits.
- All necessary forms, records and reports are prepared and submitted.
- Accountability and financial records are cleared of the lost assets, minor property, equipment, or supplies.
- Lost assets, minor property, equipment, or supplies are replaced, if appropriate/necessary.
- Future vulnerability is examined and appropriate controls are implemented.

NOTES

If a loss is due to theft and the perpetrator(s) is identified, he/she must be immediately reported to the local authorities/base security. In such instances, all investigative discoveries will be made available to the local authorities.

Incidents of this type require you to know your local procedures for whom to contact and what to do. Apprehension and prosecution of the perpetrator(s) should be done as expeditiously as possible.

NOTES (cont.)

Disposition of lost/stolen APF shall be handled in accordance with current directives available from the supply officer. Communicate with the local supply officer/property office for additional guidance and procedures regarding loss of any APF property.

Many of the tasks in this MCCS Managers' Desk Reference set apply to this task.

Refer to the following additional tasks:

3.5 - Ensure Safe Program Environment

5.6 - Control Receipts and Cash.

5.10 - Conduct Surprise/Unannounced Cash Counts.

6.5 - Train/Develop Staff.

6.14 - Discipline Staff.

6.15 - Indoctrinate Staff on Workplace Violence and Gang Activities.

7.2 - Control Supplies, Resale Merchandise, Equipment and Property.

8.5 - Ensure Proper Disposal of NAF/APF Property, Equipment, and Vehicles.

9.2 - Prepare Correspondence.

9.3 - Develop Internal Policies/Procedures (SOPs).

PROCEDURE

Step 1 Review your local MCCS SOPs and instructions that detail what to do when fixed assets, minor property, equipment, or supplies are reported/discovered missing.

This information should:

- Prepare you to take timely and appropriate action.
- Give you information to ensure appropriate staff response/actions.
- Give you information to review, revise, and improve your Program SOPs for this task.
- Give you information to train new staff members and prepare local policy and procedure for your Program.
- Inform you and your staff of controls/procedures to minimize property losses.

Step 2 Take immediate action in cases of obvious theft, fraud, embezzlement, breaking and entering, and any violent or life threatening crime or activity.

☐ Follow your local directive, policy, or procedure.

☐ Notify others as directed.

Typically: (1) Police/security/PMO/NCIS, (2) your immediate supervisor, (3) MCCS Director, and (4) the Command representative.

☐ Notify legal authorities as directed by your immediate supervisor or higher authority.

☐ Protect MCCS and Marine Corps fixed assets, minor property, equipment, or supplies against further loss.

See Task 6.15, Indoctrinate Staff on Workplace Violence and Gang Activity.

Step 3 Discover other fixed assets, minor property, equipment, or supplies are missing through:

- ☐ Daily observation by remaining alert to what fixed assets, minor property, equipment, or supplies you have and where these are "normally" located.
- ☐ Remaining aware of temporary custodies and items sent out for repair, disposal, or otherwise temporarily relocated. (See Task 8.3, Inspect Facility/FF&E.)
- ☐ Conducting scheduled/unscheduled inventories and surprise/ unannounced cash counts. (See Task 5.10, Conduct Surprise/ Unannounced Cash Count.)
- ☐ Receipt of a report from another person whether:
  - Face-to-face.
  - Via the telephone.
  - Written memo/note or e-mail.

Step 4 Verify the item/s is/are actually lost or stolen rather than just misplaced or temporarily relocated.

IF ITEM(S) ARE:	AND:	THEN
Somewhere else.	Authorized.	1. Take no further action. 2. Thank whoever made the initial discovery for his/her alertness and concern. 3. Ensure your property records are adjusted if the item is to remain in a different location. **-OR-** 4. Ensure item is returned to its normal/authorized location by specified date/time. **STOP HERE.**
	Not authorized.	1. Investigate the incident. 2. If needed, take appropriate remedial/ disciplinary action based on the nature/severity of the incident. 3. Brief your staff as appropriate regarding the situation. 4. Thank whoever made the initial discovery for his/her alertness and concern. 5. Review, and if necessary adjust controls. 6. Go to next Step.
Lost or Missing.	Verified by report from person who lost the item(s).	
	Discovered by an inventory with no substantiation of theft.	
	NOT misplaced.	
	NOT transferred or on “authorized loan”.	
	NOT being repaired.	
	NOT scrapped or salvaged.	

Step 5 Collect and record all immediately available facts.

- ☐ What item(s) is/are missing?
- ☐ Who reported item(s) missing?
- ☐ Date and time?
- ☐ How detected/why noticed?
- ☐ Date and time item last sighted & by whom?

All facts:

- ☐ When?
- ☐ Why?
- ☐ What?
- ☐ Where?
- ☐ Who?
- ☐ How many?
- ☐ Acquisition cost?
- ☐ Original controls?

Step 6 Make preliminary notifications to appropriate authorities.

You may need to notify more than one of the following:

- ☐ Your immediate supervisor.
- ☐ MCCS Director.
- ☐ Property custodian who has responsibility for the missing item.
- ☐ MCCS support staff/business office.
- ☐ APF supply/property office.
- ☐ Headquarters (MR).
- ☐ Others as directed by higher authority or detailed in local policy. (E.g., duty officer, security, PMO, local police, CO/XO, etc.)

Step 7 Conduct or assist in an investigation as directed by higher authority and/or standing policy and procedure.

When property thought lost or stolen is found, pass the word to everyone previously notified.

- Counsel staff as appropriate to minimize this type problem.
- Review and improve controls, as applicable.

(See Task 7.4, Control/Minimize Shrinkage.)

Step 8 Prepare an MCCS incident report or memo per local policy. (See Task 9.2, Prepare Correspondence.)

Ensure the report/memo completely describes the incident and includes:

- ☐ Item(s) missing?
- ☐ Who reported item(s) missing?
- ☐ Date and time of report?
- ☐ How detected and why noticed?
- ☐ Date and time item last sighted?
- ☐ Who last saw the missing item?
- ☐ Witnesses, if any?
- ☐ All facts:
  - ☐ When?
  - ☐ Why?
  - ☐ What?
  - ☐ Where?
  - ☐ Who?
  - ☐ How many?
- ☐ Acquisition cost(s)?
- ☐ Original controls?
- ☐ Recommended change to controls, if any?

Step 9 Send report and supporting documentation to MCCS Director via your immediate supervisor.

Step 10 Make information up-date calls (e-mails, memos, fax's, etc.) as appropriate.

You may need to follow-up with more than one of the following:

- ☐ Your immediate supervisor.
- ☐ MCCS Director/Deputy.
- ☐ Property custodian (person with accountability responsibility for the missing item).
- ☐ MCCS support staff/Finance office.
- ☐ Headquarters (MR).
- ☐ Others as directed by higher authority or detailed in local policy. (E.g., duty officer, security, PMO, local police, CO/XO, etc.)

Step 11 Be prepared to brief your immediate supervisor, MCCS Director, security/ PMO/police, XO/CO, MCCS Program, or APF Supply/Property office, and others with the details of the incident.

Step 12 Communicate with security (and the local authorities if they were involved) to obtain copies of their reports for your records.

- Depending on your local policy and procedures, this step may be accomplished by the MCCS Finance Office, your immediate supervisor, or someone designated by the MCCS Director.
- Record the incident/case number.

Step 13 Provide information as requested by the MCCS Admin Office so the NAF Property and Liability Claim notification can be prepared and sent to Headquarters (MRG) within 30-days of the incident. (See example format at end of this task.)

Step 14 Prepare NAVCOMPT 2212, Certificate of Disposition.

- ☐ Nomenclature of asset.
- ☐ Summary of loss.
- ☐ What happened?
- ☐ Date.
- ☐ Findings.
- ☐ Special notes.
- ☐ Extenuating circumstances.
- ☐ Reason for disposition.
- ☐ Attach all supporting documentation.

Step 15 Provide information as needed so the Business Office can make appropriate entries to remove asset, depreciation, etc., from MCCS accounting records.

Step 16 Send all reports and documentation to MCCS Director via your immediate supervisor for review.

Step 17 Review controls with your immediate supervisor and the property custodian. (See Tasks 7.3, Inventory Supplies, Resale Merchandise, Equipment and Property, and Task 7.4, Control/Minimize Shrinkage.)

Step 18 ☐ Consider other areas that might have similar risks.

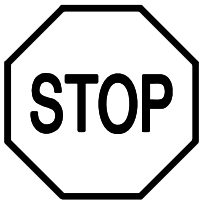
Step 19 Implement new internal controls or improve existing controls to prevent or reduce the possibility of recurring losses.

Step 20 Be prepared to brief your immediate supervisor, MCCS Director, and others concerning:

- ☐ Loss and cost of loss.
- ☐ Immediate/long term effect on operations.
- ☐ Status of investigations.
- ☐ Status of original internal controls.
- ☐ Significant findings of fact.
- ☐ Status of disposition efforts.
- ☐ Status of item replacement.

Step 21 Review impact of loss on operations to decide if item(s) need to be replaced.

IF ITEM SHOULD BE REPLACED:	THEN:
YES.	1. Direct procurement of replacement. 2. Receive replacement item(s). 3. Ensure new item(s) are entered on property records. 4. Ensure item(s) are permanently and properly marked per local SOP. Refer to tasks 7.1 and 7.2.
NO.	1. **STOP**. No further action required.



Congratulations! You've completed this task.

NAF PROPERTY AND LIABILITY CLAIM FORMAT

This format should be completed in either of the following instances:

1. NAF Property Claims - In the case where an MCCS organization has suffered a loss of, or damage to their MCCS NAF property.

2. Potential Liability Claims against MCCS - In the case where third parties such as customers/patrons of an MCCS organization are involved in incidents, accidents, or mishaps arising out of MCCS sponsored or authorized programs, activities, and events.

   a. Date and time of day accident or incident occurred: _____

   b. Location of accident or incident: _____

   _____

   c. Persons involved and their relationship to the MCCS Program. Indicate whether each person involved was a NAF MCCS staff member, customer/patron, guest, or contractor, etc.:

      1. _____

      2. _____

      3. _____

   d. Vehicles involved (indicate whether NAF, APF, or private owned vehicle (POV). Identify Marine Corps vehicles by USMC registration number):

      1. _____

      2. _____

      3. _____

   e. MCCS facilities, property, equipment, or special purpose equipment and how these might have contributed to the incident or accident:

      1. _____

      2. _____

      3. _____

f. "Outside" organizations (not affiliated with or sponsored by MCCS, such as independent contractors, private organizations, and concessionaires, and to what degree they were involved in the incident or accident: (If applicable.)

1. _____

2. _____

g. Date Base Legal was notified and provided with accident reports such as Police/ PMO or Base Security reports or eyewitness statements. Note: This applies only to those accidents and incidents where the possibility of a liability claim arising out of the mishap exists.

h. Brief description of the accident, incident or mishap.

_____

_____

_____

_____

i. Include the following as enclosures:

1. A copy of accident or incident report.

2. A copy of current value (from asset list) of each item being claimed.

3. Two estimates of repair.

4. Point of contact (POC) with commercial and DSN phone numbers.

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.7

Schedule Use of Facilities, Equipment, and MCCS Vehicles

DO THIS TASK WHEN

- A customer/patron or a customer/patron group has requested the use of your facility, one of your Program's areas or spaces, equipment, or vehicles.
- You need to request the use of another facility or space to meet special requirements/needs of your Program.
- The MCCS Program needs/requests use of your facility, one of your Program's areas, spaces, equipment or vehicles.
- You need to request the use of another facility or space to meet special needs of your customers/patrons or a customer/patron group.

REFERENCES

- DoDI, 1015.10 (series), Programs for Military Morale, Welfare, and Recreation (MWR).
- MCO P1700.27 (series), MCCS Policy Manual.
- SECNAVINST 1700.12 (series), Operation of Morale, Welfare, and Recreation Activities.
- Risk Management Manual.

REFERENCES (cont.)

- MCO P1710.30D, Marine Corps Children and Youth Program.
- Local policies and standard operating procedures (SOPs) for facility rentals and use.

SUPPLIES/ RESOURCES

- MCCS Program's planning calendar.
- Your program activity calendar.
- Your daily things-to-do list.
- Vehicle log/registration book.
- Contract forms.
- Local user agreements.
- Customer/patron handouts.
- Computer and scheduling software.
- Typical office supplies.
- Release/hold-harmless agreements.
- Phone listings and yellow pages.
- "Welcome Aboard" packages.
- List of local area comparable facilities and/or service, equipment, product providers.

THIS TASK IS DONE CORRECTLY WHEN

- You have made the best use of your facilities' schedules for the benefit of your authorized customers/patrons or customer/patron groups.
- Your Program maintains a superior level of service and customer/patron satisfaction during times of high participation/demand.
- You have improved community relations through effective communications and efficient scheduling of your facility.
- Your scheduling of the facility minimizes customer/patron dissatisfaction regarding the traditional uses/users of your Program.
- You scheduled only authorized activities/events.
- Your customers'/patrons' activities/events/programs and use of your facilities/spaces were authorized.

NOTES

When your facilities are in high demand, there are usually more people who want to use them than you can accommodate. Therefore, throughout the year, you must be able to schedule the use of your facility to provide the best support to the largest number of people.

From time-to-time you may also have to find and schedule additional facility space to use for some of your Programs. This requires that you provide your staff contingency plans and guidance.

This task refers to the no-cost use/scheduling as well as the rental/check-out of facilities/vehicles/equipment for traditional customer/patron uses.

For Example:

- Cabins, lodges, permanent trailers.
- Dining and banquet areas.
- Ballroom/dance/party areas.
- Conference areas (small and large).
- Child care during off-duty hours.
- Game room areas (bridge parties, teas, receptions, etc.).
- Arenas, fields, courses, courts, parks, pools, beaches, etc.
- Camp sites, hunting/fishing/shooting areas/facilities.
- Marina facilities and other special purpose areas.
- MCCS sedans, pickups, vans, buses, etc.

The easy part of this task is comparing the need or request to an existing schedule and confirming that fulfilling the request is authorized. The difficult part comes in where your existing schedule conflicts with a customer's/patron's request/need.

The following steps are written to guide you in scheduling your facilities/vehicles and coordinating other area/vehicle schedules when necessary.

PROCEDURE

SCHEDULE FACILITIES, EQUIPMENT and VEHICLES

Step 1 Review all appropriate orders, instructions and local policy (if any) that contain guidance on use of MCCS facilities, equipment and vehicles.

NOTE:	Your attention to all facility, equipment, and vehicle usage policy and responsibilities will help you provide your staff timely and effective on-the-job training and guidance regarding use of your facilities, equipment, and vehicles. Refer to Task 9.3, Develop Internal Policies/Procedures (SOPs), if you need to write or review/revise your local policies. See Step 10 for specific guidance vehicle use.

As the Program manager, you should be able to answer the following policy related questions:

- What policy (instructions, notices, messages, bulletins, official memoranda, and SOPs) apply to the authorized use of your facilities, equipment, and vehicles?

- Are these specifics included in your local policies? (If you answer NO, up-date/add them.)

  - Accidents and emergency procedures.
  - Authorized and prohibited activities/events/products/services.
  - Authorized customers/patrons.
  - Ancillary services available. (E.g., coaches, trainers, guides, security, catering, etc.)
  - Clean-up/maintenance responsibilities.
  - Customer service behaviors of your staff.
  - Fees, prices, and charges including deposits.
  - Hours of use and limitations.
  - Licensing and/or pre-use training requirements.
  - Patron and staff safety and security requirements.
  - Quality standards of your facility, equipment, and MCCS vehicles.
  - Releases/"hold harmless" agreements.
  - Required supplies, tools, and/or equipment.
  - Staffing requirements. (E.g., how many, and who does what, when, where, why and how do they do it?)
  - Who schedules the use of your facilities, equipment and MCCS vehicles and how.
  - Other, as applicable.

Step 2 Ensure your front-line staff always determines whether or NOT a customer/patron is authorized to use the facility, equipment, or vehicles he/she has requested. (See note below.)

IF THE REQUESTOR IS:	THEN:
In your list of eligible customers/patrons.	1. He/she **IS** authorized to use your facilities/vehicles. 2. Continue processing this request with Step 3.
NOT in your list of eligible customers/patrons.	1. He/she is **NOT authorized** to use your facilities/vehicles. 2. Politely and professionally disapprove the request. 3. If applicable/appropriate to the situation, suggest alternatives to accommodate this request/need using either other authorized on base programs/services or those in your local community.

NOTE: All Program managers should create and maintain an up-to-date list or a SOP defining customer/patron eligibility.

The list or SOP should include the traditional eligibility hierarchy of active duty Marine Corps, active duty other, retired Marine Corps, etc., including all eligible civilians and other special use groups such as a local theater company using the base theater for a scheduled performance or a local school district's use of athletic fields for a tournament.

This list or SOP should contain a list of both the authorized and prohibited activities/events/uses and the current fees, prices, and charges, if any. Refer to your local instructions and to those cited on page 8.7.1 in the reference section of this task.

Apply local policy where the Commanding General/Officer has specified conditions/authorizations that are "for the good of the Community".

Ensure the perception of your principal customer/patron (the active duty member) remains that he/she is **NOT** being inconvenienced or restricted by these extended eligibility authorizations. Repeatedly train and reinforce customer/patron eligibility and customer service with your front-line staff! ***Your customer's/patron's first impression is going to be long-lasting if NOT permanent.***

Step 3 Ensure all your front-line staff determines whether or NOT each planned use of the facility, equipment, or vehicles is for an activity that is legal, safe and authorized.

IF THE PLANNED USE IS:	THEN:
Legal, Safe and Authorized.	Go to Step 4.
NOT Legal, Safe, or Authorized.	1. Politely and professionally disapprove the request and suggest alternatives if possible. 2. Go to Step 9.

NOTE: Activities/events must NOT be any of those prohibited in the references cited on page 8.7.1.

- Include, in your SOPs, a list of prohibited activities and your local restrictions.
- All activities/events need to be consistent, in both presentation and content, and include the Marine Corps' entertainment standards and goals of promoting equality, personal dignity, and integrity.
- Activities/events must meet standards of appropriateness, political correctness, non-discrimination, etc.

Step 4 Ensure your staff always checks the program/activity calendar, schedule log, or computer database to determine if there are any date/time/space conflicts.

IF THERE IS:	THEN:
A date/time/space conflict.	1. Discuss/negotiate alternatives to the original requested date/time/space. • If alternative date, time, space requirements are satisfactory, book the event and continue with Step 5. • If alternative date, time, space won't meet the customer's/ patron's needs, thank them and refer them to alternative MCCS facilities or the local community if possible. 2. Go to Step 9.
NO date/time/space conflict.	Continue with Step 5.

Step 5 Provide a locally prepared checklist of items and issues for your front-line staff to discuss with the customer/patron for use of your facility, equipment, or MCCS vehicles to prevent loss, damage, or liability.

For example:

- ☐ Security requirements.
- ☐ Staffing requirements.
- ☐ Safety requirements.
- ☐ Clean-up responsibilities.
- ☐ Repair policy.
- ☐ Capacity.
- ☐ Local/typical forms. (E.g., sponsorship, waivers, special event requests, etc.)
- ☐ Reservations and deposits.
- ☐ Fire/safety permits/inspections.
- ☐ Emergency procedures and services.
- ☐ Fees, prices, charges, and deposits, if any.
- ☐ Hours of use and limitations.
- ☐ Applicable insurance and liability coverage.
- ☐ Licensing and/or pre-use training requirements.
- ☐ Maps/drawings of the base, area, facility.
- ☐ Ancillary services available. (E.g., coaches, trainers, guides, security, catering, etc.)
- ☐ Authorized and prohibited activities/events/products/services. (Refer to MCO P1200.27 (series), MCCS Policy Manual and Risk Management Manual.
- ☐ Other on-base and local area attractions and activities related to your business and the customer's/patron's requests, needs, or interests.

NOTE: Train all new, front-line staff members and let them rehearse this skill **BEFORE** putting them on the job.

Ensure your user agreements/release agreements contain an applicable "hold harmless" disclosure and are relative to the facility, equipment, and/or vehicle being signed for.

Step 6 Supervise and coach your front-line staff in the collection of fees, prices, charges, deposits, credit cards and refund procedures, and in accepting coupons applicable to your Program.

NOTE: Refer to the following tasks:

- 5.6, Control Receipts and Cash.
- 5.8, Manage Change Fund.
- 5.9, Close Out Daily Financial Transactions.

Step 7 Ensure your front-line staff members are able to correctly and professionally explain your fees, prices, charges, deposit requirements, rental contracts, trip ticket, schedules/requirements, credit card and refund procedures. Also, how to accept coupons applicable to your Program. (Train new staff members and let them rehearse this skill before putting them on the front-line.)

☐ Ensure your front-line staff determines if rental/use is still desired.

IF:	THEN:
Desired.	1. Request that the person requesting the use of the facility come in (if this request is being done over the telephone) and review/sign the rental contract..., **- OR -** 2. Agree to mail, e-mail or fax the contract to the person and have him/her return it to you with applicable payments or deposits included.
NOT desired.	1. Thank the customer/patron for his/her inquiry and interest in your Program. 2. If applicable/appropriate to the situation, suggest alternatives to accommodate this request/need using either other authorized on base programs/services or those in your local community. 3. Go to Step 9.

Step 8 Supervise and coach your front-line staff in completing the following wrap-up activities:

- ☐ Once the contract or rental agreement is signed, collect the rental fee or deposit, if applicable/required.
- ☐ Enter the activity on your Program calendar, scheduling log, or applicable computer scheduling database program.
- ☐ Give the customer/patron his/her copies of any contracts, cash receipts, or credit card copies.
- ☐ Give the customer/patron whatever he/she needs relative to the request.
  - Keys/combination to locks.
  - Security/entry tickets, stubs, stickers, etc.
  - Local area information, if applicable.
  - Customer service point-of-contact (POC) phone numbers and names.
  - Emergency phone numbers.
  - Rules, regulations and customer/patron responsibilities concerning use of the facility/vehicle.
  - Trip ticket.
- ☐ File the contract in the appropriate file, if the transaction is contract based.
- ☐ Close-out daily financial transactions.

COORDINATE ALTERNATIVES FOR MORE SPACE/ANOTHER VEHICLE

Step 9 Supervise and coach your front-line staff in handling situations in which the customers/patrons need more space or vehicles than your Program can accommodate.

> **NOTE:** As above, always train all your front-line staff in this skill BEFORE he/she is involved with your customers/patron.
>
> The worst time for a staff member to need NEW information is when they are handling business.

Ensure your staff is able to:

- ☐ Determine facility requirements. (E.g. size, type, location, support requirements, etc.)
- ☐ Identify alternative sources on the base or in the community.
- ☐ Contact the most appropriate source.
- ☐ Describe the customer's/patron's needs and determine if the alternative facility or vehicle is available and adequate.
- ☐ Obtain the costs for using this alternative facility/vehicle.
- ☐ Ensure the costs are within budget where your Program pays costs, or ensures that the customer/patron is okay with the quoted costs, if any.
- ☐ Confirm customer/patron wants to use the alternative facility/vehicle.
- ☐ Coordinate reservation/registration.
- ☐ Complete and file documentation as required.

> **NOTE:** This step requires that your front-line staff have access to:
>
> - A list of recommended/local alternative sources.
> - Yellow pages and local phone directories.
> - Local area map(s).
> - "Welcome Aboard" Package/Information, etc.

SCHEDULE VEHICLE FOR SPECIAL USES

Step 10 Supervise and coach your front-line staff in handling situations in which the customers/patrons ask to use an MCCS vehicle.

NOTE:	Train your front-line staff in this skill BEFORE he/she is involved with your customers/patron.

Ensure your staff is able to:

☐ Determine that the customer/patron is asking to use an MCCS vehicle for authorized special purpose.

- Ensure these authorized uses are spelled out in your local SOPs.

☐ Comply with MCO P1700.27 (series) and your local policies, including safety and accident prevention/reporting training.

☐ Ensure the customer/patron holds a valid state vehicle operator's license.

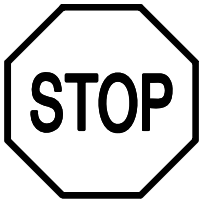
NOTE:	Vehicles larger than passenger cars, pickup trucks, and panel trucks/ vans may require that the operator possess a valid government operator's license (Standard Form 46). (This distinction is typically defined by vehicle weight/size and specified in local policy.) Operators of special purpose vehicles such as forklifts may need special licenses or certifications. Check your state licensing requirements for drivers to transport passengers.

☐ Confirm whether the customer/patron will operate the MCCS vehicle in accordance with all state, local and federal laws and station regulations.

☐ Use applicable local records and forms to record operation, maintenance, and vehicle use.

☐ Review applicable operating and insurance requirements with the customer/patron.

☐ Ensure the vehicle is fueled and ready for operation. (See suggested vehicle checklist in Task 8.3, Inspect Facility/FF&E.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 8.0 - MANAGE THE PHYSICAL PLANT

TASK 8.8

Oversee Vehicle Maintenance and Use

DO THIS TASK WHEN

- You have one or more vehicles assigned to your Program, business or office.
- One or more of your staff members need to use an MCCS vehicle.
- Unauthorized use of your vehicles occurs.
- Preventive maintenance (PM) inspection and maintenance dates/schedules occur.
- Accidents occur involving your Program, business or office vehicles.
- A staff member receives a citation while operating a government vehicle.

REFERENCES

- DoDI, 1015.10 (series), Programs for Military Morale, Welfare, and Recreation (MWR).
- SECNAVINST 1700.12 (series), Operation of Morale, Welfare, and Recreation Activities.
- MCO P1700.27 (series), MCCS Policy Manual.
- Risk Management Manual.
- NAF Composite Insurance Manual.

REFERENCES (cont.)

- NAVFAC P-300, (series) Management of Civil Engineering Support Equipment.
- Local policies and standard operating procedures SOPs for MCCS vehicle inspection, maintenance, and use.

SUPPLIES/ RESOURCES

- Your daily things-to-do list.
- Vehicle log/registration book.
- Operator's checklist/vehicle operator's manual.
- Standard Form 91, Motor Vehicle Accident Report.
- Form LS-201, Employer's First Report of Accident.
- Emergency point-of-contact (POC) phone list.
- PM inspection checklists.
- Applicable inspection and maintenance tools and supplies.
- Local forms.
- Computer and scheduling software.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Your vehicles are operated safely and legally.
- Your vehicles are routinely inspected and properly maintained.
- Vehicles are used ONLY for authorized purposes.
- Vehicles are used ONLY by authorized drivers.
- Accidents are followed-up.

NOTES

Proper operator maintenance using the PM checks and services approach can keep your vehicles operating longer and will save money over the life of the vehicle.

The importance of overseeing vehicle use and maintenance cannot be over-emphasized, because the staff does well what you check. This task will help you do the checking.

As with your facilities, equipment, machinery, and tools, you should have written contingency plans to implement when one or more of the vehicles, critical to your Program, are unavailable or out of operation.

It is imperative that you train and supervise your staff in taking care of your vehicles so they will last and minimize your customer's/patron's negative images about MCCS vehicles.

MCCS staff members who are required to operate MCCS vehicles will need a valid state driver's license and perhaps special permits/certifications depending on what type vehicle they are required to use.

You should ensure each of your staff members who are required to operate an MCCS vehicle, know the following:

- What constitutes "official" use and what is considered unauthorized use of a government vehicle. Unauthorized use may result in a 30-day employment suspension.
- What to do in the event of an accident or traffic violation involving a government (MCCS or other) vehicle.
- The maintenance and care requirements while operating a government (MCCS or other) vehicle.

PROCEDURE

Step 1 Review all appropriate orders, instructions and policy (if any) on standards of maintenance and operation of vehicles applicable to your Program and your area(s) of responsibility.

NOTE:	Your attention to all maintenance details and responsibilities will help you provide your staff timely and effective on-the-job training (OJT) and guidance regarding vehicle operation, inspection, and maintenance. Refer to Task 9.3, Develop Internal Policies/Procedures (SOPs), if you need to write or review/revise your local policies.

As a Program manager, ensure you can answer the following vehicle policy related questions:

- What maintenance policy (instructions, notices, messages, bulletins, official memoranda, and SOPs) apply to your Program's vehicles?
- Are policies up-to-date? (If you answer NO, up-date/add, as applicable.)
- Are these specifics included in the policies? (If you answer NO, up-date/add them.)
  - Owner/operator guidance from original owner's manuals?
  - Maintenance schedules/frequencies?
  - Assignments, responsibilities, and required skills?
  - Who does what, when, where, why and how-to-do?
  - Required supplies, tools, and/or equipment?
  - Required adjustments?
  - Lubrication/cleaning details?
  - Replacement schedules?
  - Safety precautions?
  - Emergency procedures?
  - Quality standards?
  - Others, as applicable.
- Do you have a list of your vehicles by NAF and APF. (Apply APF property rules for all APF vehicles.)
- What warranty conditions apply to your vehicles?
- Should other areas/details/tasks/steps be included in the vehicle operation and maintenance policies? (If you answer YES, up-date them.)

Step 2 Ensure each of your drivers receives thorough training and certification/ documentation in the following:

- ☐ Operation of each vehicle he/she is required to use.
- ☐ Accident prevention and defensive driving.
- ☐ Authorized and unauthorized use of government (MCCS) vehicles.
- ☐ Accident report requirements, procedures and use of accident report forms.
- ☐ Use of trip logs per local policy.

Step 3 Ensure each of your drivers has a valid state operator's licenses.

- Check state laws regarding license requirements for special vehicles.

Step 4 Periodically check with security to get each of your drivers' motor vehicle operating records reviewed.

- You could check these during your annual Standards of Conduct training or while preparing to conduct staff performance reviews.
- Follow local policy regarding what action to take when one of your drivers' records indicate driving problems that may put your vehicles, customers/patrons, and other staff members at possible risk. (E.g., speeding violations, accidents, DUI/DWI, etc.)

Step 5 Ensure your vehicles are operated in accordance with state laws, Command regulations, and MCCS Program/Base policies.

> **NOTE:** Vehicles larger than passenger car, pickup truck, and panel truck/ van may require that the operator possess a valid government operator's license (Standard Form 46). (This distinction is typically defined by vehicle weight/size and specified in local policy.)
>
> Operators of special purpose vehicles such as forklifts may need special training, licenses, and/or certifications.
>
> Check your state licensing requirements for drivers to transport passengers.

Step 6 Use local records and forms to record the details of vehicle operation, maintenance, and usage.

Step 7 When available/applicable, ensure your vehicles are fueled and serviced by MCCS or Base Motor Transport (MotorT) facilities on a reimbursable basis. Otherwise, use gas cards in accordance with your local Command or MCCS Program instructions/policies.

Step 8 Develop plans for vehicle maintenance requirements, accidents, and operations follow-up.

IF:	THEN:
Daily operator PM checks and services.	Go to Step 9.
Periodic checks and services.	Go to Step 12.
Emergency repairs.	Go to Step 16.
Accident.	Go to Step 22.
Traffic violation.	Go to Step 24.

DAILY PREVENTIVE MAINTENANCE

Step 9 Review requirements for PM with operators.

Step 10 Provide PM checklist and on-the-job inspection and maintenance training for your vehicle operators. (See PM Checklist on page 8.8.13.)

Step 11 Spot check your operators to make sure they are performing PM correctly and when scheduled.

- ☐ Provide feedback or additional training as required.

PERIODIC CHECKS & SERVICE

Step 12 Respond to "call-ins" regarding required periodic checks and service from MCCS, Base Motor Transport (MotorT), GSA, etc.

- Coordinate your vehicle maintenance with local MCCS, GSA policy.

Step 13 Ensure your vehicle(s) are delivered for checks and services in accordance with applicable PM schedules.

NOTE:	If needed, arrange for a temporary-use vehicle while your vehicle is being checked, inspected, or serviced.

Step 14 Notify the activity performing the maintenance about any deficiencies found on the vehicle(s) during <u>your</u> PM checks.

Step 15 Check to see if deficiencies have been corrected upon return of the vehicle.

EMERGENCY REPAIRS LOCAL

Step 16 Determine best source of repairs when on-the-road repairs are necessary.

- Refer to local SOP covering cost limits/procedures and delegation.

IF THE BEST SOURCE FOR REPAIRS IS:	THEN:
On-base.	Schedule the repairs through MCCS Maintenance. **-OR-** Base Motor Transport or GSA.
Off-base.	Go to Step 17.

EMERGENCY REPAIRS ON THE ROAD

Step 17 Contact MCCS, Base Motor Transport, or GSA for instructions on what to do with the vehicle.

IF REPAIR/MAINTENANCE IS THE RESPONSIBILITY OF:	THEN:
Base Motor Transport.	1. Make arrangements to get the vehicle towed, repaired, serviced, or maintained. 2. Monitor and follow-up on the vehicle status.
MCCS Program Manager (you).	1. Inform your immediate supervisor and refer to MCCS, Base Motor Transport or GSA for guidance on what to do with the vehicle. 2. Obtain an estimate of repair cost in writing. 3. Determine if the estimate of repairs is cost effective. 4. Make arrangements to get the vehicle towed or repaired. 5. Monitor and follow-up on the vehicle status.

Step 18 Submit request/authorize payment for repairs.

- Purchase order/purchase order number.
- Petty cash.
- Personal check, credit card, cash.
- Government purchase card.

Step 19 Request repairs be made on the vehicle.

Step 20 Pick up/inspect the vehicle.

Step 21 Submit necessary paperwork.

NOTE:	Include these items in your SOP for vehicle operations and maintenance.

ACCIDENT

Step 22 Ensure your staff members accomplish the following if they are involved in a motor vehicle accident while operating a government/MCCS vehicle.

- ☐ If injury accident, render assistance as capable and qualified.
- ☐ If injury accident, place call or ask someone to call for emergency assistance.
- ☐ If on-base, report the accident to base Security/PMO, immediate supervisor, and the MCCS Director, via local chain of command reporting policy.
- ☐ If off-base, report the accident to local/State police, immediate supervisor, and the MCCS Director, via local chain of command reporting policy.
- ☐ If uninjured and capable, collect insurance numbers from each motor vehicle operator involved in the accident.
- ☐ If uninjured and capable, collect information from any/all on-scene witnesses.
- ☐ Complete the accident report. (See example after page 8.8.14.)
- ☐ Arrange for towing, if applicable.

NOTE:	Include these items in your SOP for vehicle operations and maintenance.

Step 23 Prepare and submit Employer's First Report of Accident, LS-201, when applicable. (See Task 6.16, Respond to Accidents, Injuries, or Illnesses.)

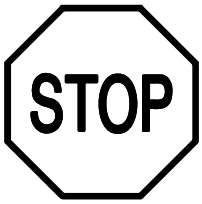
- Prepare and submit within 10-days of the event.
- Process through your chain of command.

Step 24 Notify Headquarters (MRG).

TRAFFIC VIOLATION

Step 25 Follow your local operating procedures when one of your staff members commit a traffic violation while operating a government vehicle.

NOTE:	You will have to determine the appropriate personnel action, if any, to take if one of your staff members is cited while driving a government vehicle. See Task 6.14, Discipline Staff.



Congratulations! You've completed this task.

OPERATOR'S VEHICLE MAINTENANCE/SERVICE CHECKLIST			
OPERATOR'S NAME	**DATE**	**VEHICLE #**	
CHECK FOR:	**OK**	**NOT OK**	**COMMENTS**
1. Dents/damage to body work, glass or mirrors.			
2. Correct tire pressure.			
3. Lights operating:			
a. Brake lights.			
b. Headlights (high/low beam).			
c. Turn indicators.			
d. Parking lights.			
e. Emergency flashers.			
4. Fluid levels:			
a. Gasoline.			
b. Engine oil.			
c. Transmission oil.			
d. Brake fluid.			
e. Steering fluid.			
f. Windshield fluid.			
5. Brake operation. (Pedal has resistance.)			
6. Seat belts working.			
7. Emergency kit (flares, first aid, reflectors, etc.).			
8. Tire change tools and spare tire.			

Note in the comments section any item(s) you believe to excess, unserviceable, or obsolete.

MOTOR VEHICLE ACCIDENT REPORT	Please read the Privacy Act Statement on Page 3.	INSTRUCTIONS: Sections I thru IX are filled out by the vehicle operator. Section X, Items 72 thru 82c are filled out by the operator's supervisor. Sections XI thru XIII are filled out by an accident investigator for bodily injury, fatality, and/or damage exceeding $500.

SECTION I - FEDERAL VEHICLE DATA

1. DRIVER'S NAME *(Last, first, middle)*	2. DRIVER'S LICENSE NO./STATE/LIMITATIONS	3. DATE OF ACCIDENT

4a. DEPARTMENT/FEDERAL AGENCY PERMANENT OFFICE ADDRESS	4b. WORK TELEPHONE NUMBER ( )

5. TAG OR IDENTIFICATION NUMBER	6. EST. REPAIR COST $	7. YEAR OF VEHICLE	8. MAKE	9. MODEL	10. SEAT BELTS USED ☐ YES ☐ NO

11. DESCRIBE VEHICLE DAMAGE	

SECTION II - OTHER VEHICLE DATA *(Use Section VIII if additional space is needed.)*

12. DRIVER'S NAME *(Last, first, middle)*	13. DRIVER'S LICENSE NUMBER/STATE/LIMITATIONS

14a. DRIVER'S WORK ADDRESS	14b. WORK TELEPHONE NUMBER ( )
15a. DRIVER'S HOME ADDRESS	15b. HOME TELEPHONE NUMBER ( )
16. DESCRIBE VEHICLE DAMAGE	17. ESTIMATED REPAIR COST $

18. YEAR OF VEHICLE	19. MAKE OF VEHICLE	20. MODEL OF VEHCLE	21. TAG NUMBER AND STATE

22a. DRIVER'S INSURANCE COMPANY NAME AND ADDRESS	22b. POLICY NUMBER
	22c. TELEPHONE NUMBER ( )

23. VEHICLE IS ☐ CO-OWNED ☐ RENTAL ☐ LEASED ☐ PRIVATELY OWNED	24a. OWNER'S NAMES(S) *(Last, first, middle)*	24b. TELEPHONE NUMBER ( )

25. OWNER'S ADDRESS(ES)

SECTION III - KILLED OR INJURED *(Use Section VIII if additional space is needed.)*

A

26. NAME *(Last, first, middle)*	27. SEX	28. DATE OF BIRTH

29. ADDRESS

30. MARK "X" IN TWO APPROPRIATE BOXES	31. IN WHICH VEHICLE	32. LOCATION IN VEHICLE	33. FIRST AID GIVEN BY
☐ KILLED ☐ DRIVER ☐ PASSENGER ☐ INJURED ☐ HELPER ☐ PEDESTRIAN	☐ FED ☐ OTHER (2)		

34. TRANSPORTED BY	35. TRANSPORTED TO

B

36. NAME *(Last, first, middle)*	37. SEX	38. DATE OF BIRTH

39. ADDRESS

40. MARK "X" IN TWO APPROPRIATE BOXES	41. IN WHICH VEHICLE	42. LOCATION IN VEHICLE	43. FIRST AID GIVEN BY
☐ KILLED ☐ DRIVER ☐ PASSENGER ☐ INJURED ☐ HELPER ☐ PEDESTRIAN	☐ FED ☐ OTHER (2)		

44. TRANSPORTED BY	45. TRANSPORTED TO

46. Pedestrian

a. NAME OF STREET OR HIGHWAY	b. DIRECTION OF PEDESTRIAN (*SW corner to NE corner, etc.*) FROM	TO

c. DESCRIBE WHAT PEDESTRIAN WAS DOING AT TIME OF ACCIDENT *(Crossing intersection with signal, against signal, diagonally; in roadway playing, walking, hitchhiking, etc.)*

SECTION IV - ACCIDENT TIME AND LOCATION *(Use Section VIII if additional space is needed.)*

47. DATE OF ACCIDENT	48. PLACE OF ACCIDENT *(Street address, city, state, ZIP Code; Nearest landmark; Distance nearest intersection; Kind of locality (industrial, business, residential, open country, etc.); Road description).*
49. TIME OF ACCIDENT AM PM	

50. INDICATE ON THIS DIAGRAM HOW THE ACCIDENT HAPPENED

Use one of these outlines to sketch the scene. Write in street or highway names or numbers.

a. Number Federal vehicle as 1, other vehicle as 2, additional vehicle as 3 and show direction of travel with arrow.

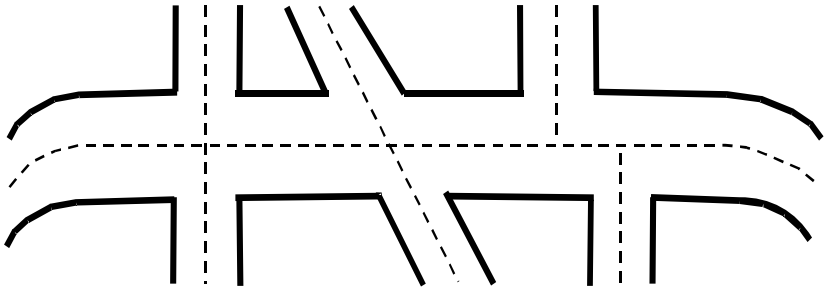
Example: 1 2

b. Use solid line to show path before accident 2
and broken line after the accident 2

c. Show pedestrian by

d. Show railroad by

e. Place arrow in this circle to indicate *NORTH*



51. POINT OF IMPACT *(Check one for each vehicle)*

FED	2	AREA
		a. FRONT
		b. R. FRONT
		c. L. FRONT
		d. REAR
		e. R. REAR
		f. L. REAR
		g. R. SIDE
		h. L. SIDE

52. DESCRIBE WHAT HAPPENED *(Refer to vehicles as "Fed", "2", "3", etc. Please include information on posted speed limit, approximate speed of the vehicles, road conditions, weather conditions, driver visibility, condition of accident vehicles, traffic controls (warning light, stop signal, etc.) condition of light (daylight, dusk, night, dawn, artificial light, etc.), and driver actions (making U-turn, passing, stopped in traffic, etc.).*

SECTION V - WITNESS/PASSENGER *(Witness must fill out SF 94, Statement of Witness) (Continue in Section VIII.)*

A	53. NAME *(Last, first, middle)*	54. WORK TELEPHONE NUMBER ( )	55. HOME TELEPHONE NUMBER ( )
	56. BUSINESS ADDRESS	57. HOME ADDRESS ( )	
B	58. NAME *(Last, first, middle)*	59. WORK TELEPHONE NUMBER ( )	60. HOME TELEPHONE NUMBER ( )
	61. BUSINESS ADDRESS	62. HOME ADDRESS	

SECTION VI - PROPERTY DAMAGE *(Use Section VIII if additional space is needed.)*

63a. NAME OF OWNER	63b. OFFICE TELEPHONE NUMBER ( )	63c. HOME TELEPHONE NUMBER ( )
63d. BUSINESS ADDRESS	63e. HOME ADDRESS	
64a. NAME OF INSURANCE COMPANY	64b. TELEPHONE NUMBER ( )	64c. POLICY NUMBER
65. ITEM DAMAGED	66. LOCATION OF DAMAGED ITEM	67. ESTIMATED COST $

SECTION VII - POLICE INFORMATION

68a. NAME OF POLICE OFFICER	68b. BADGE NUMBER	68c. TELEPHONE NUMBER ( )
69. PRECINCT OR HEADQUARTERS	70a. PERSON CHARGED WITH ACCIDENT	70b. VIOLATION(S)

SECTION VIII - EXTRA DETAILS

SPACE FOR DETAILED ANSWERS. INDICATE SECTION AND ITEM NUMBER FOR EACH ANSWER. IF MORE SPACE IS NEEDED, CONTINUE ITEMS ON PLAIN BOND PAPER.

SECTION IX - FEDERAL DRIVER CERTIFICATION

In compliance with the Privacy Act of 1974, solicitation of the information requested on this form is authorized by Title 40 U.S.C. Section 491. Disclosure of the information by a Federal employee is mandatory as the first step in the Government's investigation of a motor vehicle accident. The principal purposes for using this information is to provide necessary data for legal counsel in legal actions resulting from the accident and to provide accident information/statistics in analyzing accident causes and developing methods of reducing accidents. Routine use of information may be by Federal, State or local governments, or agencies, when relevant to civil, criminal, or mandatory investigations or prosecutions. An employee of a Federal agency who fails to report accurately a motor vehicle accident involving a Federal vehicle or who refuses to cooperate in the investigation of an accident may be subject to administrative sanctions.

I certify that the information on this form *(Sections I thru VIII)* is correct to the best of my knowledge and belief.

71a. NAME AND TITLE OF DRIVER	71b. DRIVER'S SIGNATURE AND DATE

SECTION X - DETAILS OF TRIP DURING WHICH ACCIDENT OCCURRED

72. ORIGIN	73. DESTINATION

74. EXACT PURPOSE OF TRIP

75. TRIP BEGAN	DATE	TIME *(Circle one)* **a.m. p.m.**	**76. ACCIDENT OCCURRED**	DATE	TIME *(Circle one)* **a.m. p.m.**

77. AUTHORITY FOR THE TRIP WAS GIVEN TO THE OPERATOR	78. WAS THERE ANY DEVIATION FROM DIRECT ROUTE
☐ ORALLY ☐ IN WRITING *(Explain)*	☐ NO ☐ YES *(Explain)*
79. WAS THE TRIP MADE WITHIN ESTABLISHED WORKING HOURS	80. DID THE OPERATOR, WHILE ENROUTE, ENGAGE IN ANY ACTIVITY OTHER THAN THAT FOR WHICH THE TRIP WAS AUTHORIZED.
☐ YES ☐ NO *(Explain)*	☐ NO ☐ YES *(Explain)*

COMPLETED BY DRIVER'S SUPERVISOR	**a. DID THIS ACCIDENT OCCUR WITHIN THE EMPLOYEE'S SCOPE OF DUTY**	
	☐ YES ☐ NO	b. COMMENTS

82a. NAME AND TITLE OF SUPERVISOR	82b. SUPERVISOR'S SIGNATURE AND DATE	82c. TELEPHONE NUMBER
		( )

SECTION XI - ACCIDENT INVESTIGATION DATA

83. DID THE INVESTIGATION DISCLOSE CONFLICTING INFORMATION. ☐ YES ☐ NO *(If "Yes", explain below.)*

84. PERSONS INTERVIEWED

NAME	DATE	NAME	DATE
a.		c.	
b.		d.	

85. ADDITIONAL COMMENTS *(Indicate section and item number for each comment.)*

SECTION XII - ATTACHMENTS

LIST ALL ATTACHMENTS TO THIS REPORT

SECTION XIII - COMMENTS/APPROVALS

86. REVIEWING OFFICIAL'S COMMENTS

87. ACCIDENT INVESTIGATOR	88. ACCIDENT REVIEWING OFFICIAL
a. SIGNATURE AND DATE	a. SIGNATURE AND DATE
b. NAME *(First, middle, last)*	b. NAME *(First, middle, last)*
c. TITLE	c. TITLE
d. OFFICE	d. OFFICE
e. OFFICE TELEPHONE NUMBER ( )	e. OFFICE TELEPHONE NUMBER ( )

U.S. GPO: 1994-300-892/10055

MCCS MANAGERS' DESK REFERENCE
DUTY 9.0 – OVERSEE ADMINISTRATION

WHAT THIS DUTY DOES

No one loves paperwork. But it is an unavoidable reality of the workplace and is worth doing correctly.

Communications are an essential aspect of organizational performance. The tasks covered in the following pages deal with *written* communications, policies, and procedures.

They are:

9.1 Review Messages, Correspondence, Documents, Directives, Instructions, and Orders.

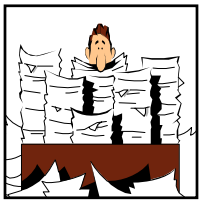
9.2 Prepare Correspondence.

9.3 Develop Internal Policies/Procedures (SOPs).

9.4 Locate, Maintain, Interpret, and Apply Official Policies and Instructions.

MCCS MANAGERS' DESK REFERENCE
DUTY 9.0 - OVERSEE ADMINISTRATION

TASK 9.1



Review Messages, Correspondence, Documents, Directives, Instructions, and Orders

DO THIS TASK WHEN

- You receive a message from any source.
- You receive correspondence from any source.
- You receive documents from any source.
- You receive a directive, instruction or notice through the chain of command.

REFERENCES

- Your MCCS Program's standard operating procedure (SOP) on reviewing, preparing, and managing correspondence.
- Your Command's correspondence manual and/or SOP on reviewing, preparing, and managing correspondence.
- SECNAVINST 5216.5 (series), Department of the Navy Correspondence Manual.
- SECNAVINST 5215.1 (series), Department of the Navy Directives Issuance System.
- U.S. Government Printing Office (GPO) Style Manual.

SUPPLIES/ RESOURCES

- Local File System.
- Routing Slips.
- Typical Office Supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Messages, correspondence, documents and directives are reviewed and appropriate action is taken.

NOTES

For the purposes of this task the following terms are provided as a guide:

- Messages: Sometimes referred to as "Naval Messages", are the telegrams of the Navy and Marine Corps. They are electronically transmitted and are used most often to communicate with field commands and for issues that need the personal attention of the Commanding Officer. They are written using a specialized computer software named, Turbo-Prep, a message transfer format (MTF) editor. This software is typically installed in either your MCCS Program's or the Command's Admin Office.

- Correspondence: Written communication in any of the following formats:

  - Standard Letter: Used in one or more variations to correspond officially with addressees within the Department of Defense (DoD). May also be used to write outside DoD sources if they have adopted this format. Examples of outside sources include the Coast Guard and some contractors doing business with the Marine Corps or Navy.

NOTES (cont.)

- Business letter: Used to correspond with agencies, businesses, or individuals outside DoD who may be unfamiliar with the format and conventions of the Standard Letter. May also be used for official correspondence within DoD when the occasion requires a personal approach.

- Memorandum: Used in one of several formats designed to suit the subject, occasion or audience, as an informal way to correspond routinely within and between activities.

• Documents: Can include any of the following:

- Inspection reports.
- Progress reports.
- SOPs.
- Budget summaries/reports.
- Daily Activity Reports (DARs).
- After-action reports.
- Accident/incident/injury/illness reports.
- Hot line reports.
- Performance evaluations.
- Activity/event evaluations.
- Financial statements.
- Evaluations.
- Inspector General (IG) reports.
- Position descriptions (PDs).
- Travel orders/claims, etc.

NOTES (cont.)

- Directives, instructions and/or orders: Can include any of the following:

  - DoD instructions.
  - Navy instructions/Marine Corps Orders.
  - Command instructions.
  - Local MCCS instructions.
  - Policy manuals.
  - Operational guides.
  - Official orders, etc.

NOTE:	Directives and instructions are permanent in nature and are in force until changed, superseded, or cancelled. Orders are temporary in nature and bear a cancellation date.

Task 9.2, Prepare Correspondence provides examples and guidelines on application and formatting.

PROCEDURE

Step 1 Determine appropriate review and action procedure:

IF YOU RECEIVE A:	THEN COMPLETE:
Message.	Steps 2 and 3.
Correspondence.	Steps 4 and 5.
Document.	Steps 6 and 7.
Directive, instruction and/or order.	Steps 8 and 9.

MESSAGE

Step 2 Review ***message*** to identify the important parts including tasking or response requirements.

Use the example on the next page to locate the following:

- ☐ Message header data. **(A)**
- ☐ Precedence and date/time group. **(B)** (The first letter indicates the importance of the message and is followed by date and time it was sent. The first two numbers indicate the day the message was sent. The next four numbers are the time in ZULU or Greenwich Mean Time. The month and year follow the time.)
- ☐ Sender. **(C)**
- ☐ Recipients. **(D)**
- ☐ Other recipients. (INFO lines) **(E)**
- ☐ Break point in header (BT). **(F)**
- ☐ Classification. **(G)**
- ☐ Subject line. **(H)**
- ☐ References. **(I)**
- ☐ Remarks line or forwarding instructions. **(J)**
- ☐ Point of contact (POC). **(K)**
- ☐ Body/content of the message. (Listed by numbers: 1., 2., etc.) **(L)**

NOTE:	The body of the message will usually determine, for the most part, what further action may be required. As a guide, look for words like, "respond", "provide", "forward", etc.

- ☐ Any tasking or response requirements. **(None in this example.)**
- ☐ Break point to end message. **(M)**
- ☐ Message footer data. **(N)**

EXAMPLE -- MESSAGE

(A)	PTTUZYUW RUCCBWF6717 0831800-UUUU--RHMCSUU. ZNR UUUUU
(B)	P 241800Z MAR 00 ZYB
(C)	FM HQMC WASHINGTON DC//
(D)	TO COMCABWEST// COMCABEAST//
(E)	INFO CG MCB CAMPEND// CG MCB BUTLER// CG MCAGCG// CG MCB HAWAII// CO MCAS IWAKUNI//
(F)	BT
(G)	UNCLAS
(H)	SUBJ/TRAVEL CLEARANCE REQUEST//
(I)	REF/A/DOC/CMC WASHINGTON DC/890505//
(J)	AMPN/MCO P1700.27 (SERIES)
(K)	POC/I. M. MOTIVATOR/CAPT USMC/TEL:DSN 224-2222/TEL:COM 202-874-6717/TEL:FAX DSN 224-6847/TEL:FAX COM 202-874-6847//
(L)	RMKS/1. TRAVEL CLEARANCE REQUESTED IAW REF A FOR FOLLOWING HQMC (CONTRACTOR) MS MARGARET ANTHONY, NF-04, SSN 135-38-7742, CLEARANCE N/A, PASSPORT NO. 014451478, ISSUED 01OCT98, EXPIRES 30SEP08. 2. ITINERARY AS FOLLOWS: MS ANTHONY WILL BE ARRIVING MCB BUTLER 1050 WEDNESDAY 01APR99 ON UNITED FLT 938, DEPARTING 1530 SUNDAY 05APR99 TO ARRIVE MCAS IWAKUNI 1736 DEPARTING 0645 TUESDAY 07APR99. SHE WILL RTN ON TWA FLT B41 ARRIVING SAN DIEGO AT 1055. 3. TO CONDUCT FRONT END ANALYSIS OF CUSTOMER SERVICE NEEDS. 4. NO FORN CONTACTS. 5. OUSDP APPROVAL NOT REQUIRED 6. CONCURRENCE IN VISIT ASSUMED UNODIR. //
(M)	BT #6717
(N)	NNNN

SAMPLE

Step 3 Determine if response to message is needed:

IF THE MESSAGE:	AND	THEN:
Is for information purposes only.	Requires **NO** response.	1. Do one of the following: • Read and discard. **-OR-** • Read and file. **-OR-** • Read and post. **-OR-** • Read and forward as applicable. 2. If you have more messages to review, return to Step 2. 3. If not, **STOP HERE.**
Is for information purposes only.	Requires response from someone other than you.	1. Delegate or forward for action. 2. Follow up as needed.
Requires response from you.	The response needs to be written.	Go to Task 9.2.
	The response can be other than written.	1. Consider responding by one or more of the following methods: • Telephone. • E-mail. • Fax. • Personal visit.

NOTE: Your local policy may provide protocol/etiquette guidance for use of Internet, e-mail and fax. If NOT, use the following:

- Use regular sentence case. (All CAPS is generally considered rude as it is read as if you are SHOUTING!)
- Identify yourself as the sender.
- Include return address or phone numbers.
- Ensure correct grammar and spelling.

If the message is important and affects your staff, highlight the important content and distribute directly or post in staff areas.

CORRESPONDENCE

Step 4 Review ***correspondence*** to identify the important parts including tasking or response requirements.

Use the examples on the next three pages to identify the following:

- ☐ Headings, serials, dates, etc. (At the top of the correspondence.)
- ☐ Sender. ("from" line and signer.)
- ☐ Addressee. ("to" line.)
- ☐ Other recipients. (As indicated by "via:" and/or "copy to:" lines.)
- ☐ Subject line. (Not applicable in a traditional business letter.)
- ☐ References. (Not applicable in a traditional business letter.)
- ☐ Enclosures. (Not applicable in a traditional business letter.)
- ☐ Body/content of the correspondence.

NOTE:	This body/content of the correspondence will usually determine, for the most part, what further action may be required. As a guide, look for words like, "respond", "provide", "forward" etc.

- ☐ Any tasking or response requirements.
- ☐ Closing signature(s).

EXAMPLE -- STANDARD LETTER

DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3044 CATLIN AVENUE
QUANTICO, VIRGINIA 22134-5099

REPLY REFER TO:
1700
MR
24 SEP XX

From: Personal and Family Readiness Division
To: Marine Corps Air Station, New River, NC
Via: Marine Corps Base, Camp Lejeune, NC

Subj: MCCS ASSOCIATE SATISFACTION INDEX (ASI) / CUSTOMER SATISFACTION INDEX (CSI) SURVEY RESULTS

Ref: (a) My 1700, MR-651M ltr of 04 JAN XX
(b) MCO P1700.27, MCCS Policy Manual

Encl: (1) MCCS Customer Service Survey Executive Summary

1. In conjunction with a vendor Associate and Customer Satisfaction Program, we have conducted the FY-XX Marine Corps Community Services Customer Service Survey on your base as scheduled in reference (a). Ref (b) requires that a MCCS patron interest survey be administered annually. The principal purpose of this survey is to collect data on customer usage and attitudes regarding the MCCS retail facilities and services on your base.

2. The ASI/CSI survey was given to a sample of authorized users in your area. This sample was stratified on the following groups: enlisted, officer, civilian, and retiree. A 12-week survey field period resulted in a 61% response rate for your base. The overall response rate for the 19 MCCS Sites in this MCCS Customer Service Survey assessment cycle was 58%.

3. Potential and current customers were asked to rate MCCS program areas in terms of importance. Section (A) of enclosure (1) shows the ten categories selected as most important, rank ordered by frequency of response.

4. Respondents also answered three general customer satisfaction questions. Section (B) of enclosure (1) shows the results for respondents using your MCCS facilities and services.

JR Jarrell
J.R. JARRELL
By Direction

SAMPLE

EXAMPLE -- BUSINESS LETTER

6900 Skyline Drive
San Diego, CA 97373
March 23, 20XX

Ms. Karen Leonard
Community Events Director
P.O. Box 555020
Building 15000
Camp Pendleton, CA 92055-5020

Dear Karen,

What a pleasure it was to see you again at the conference last week. I miss the great times we had programming at the center in San Louis for so many years. We really did put on some great activities and events.

You mentioned at the conference about a marketing and promotions guide that you had prepared for the Porterville program. It sounds terrific! I'd like to purchase a copy for my program. There are several other managers that could certainly use some "good ole' how-to" information on program marketing and promotions also. Let me know how much the guide costs and I will send you a check. After receiving it, I'll review it to determine its applicability to our other branches. If it looks like we can use it, I'll submit a purchase order for the purchase of 15-18 additional guides.

I'm glad to hear that your special events programmers were able to use the calendar I gave you. I will definitely look forward to hearing about their successful events--maybe we'll be able to use some of their ideas, too! Thanks again for the information on the marketing and promotions guide. Give me a call at (619) 555-1212 ext. 25. I look forward to hearing from you soon.

Sincerely,

Gretchen Bauer

Gretchen Bauer, CLP

SAMPLE

EXAMPLE -- MEMORANDUM

MEMORANDUM

May 30, 20XX

From: Bowling Center Manager
To: MCCS Director

Subj: PRIORITIZED NEED/PREFERENCES LIST FY-XX

Ref: (a) FY-XX Budget Call
(b) MCB Camp Pendleton MCCS Instruction

1. The following is my prioritized projects list for FY-XX, per references (a) and (b).

2. Estimated costs were obtained from Base Maintenance and bowling trade resources. The completion data information is contingent upon approval of each prioritized item for the budget year.

ITEM PRIORITY:	APPROX COST:	COMPLETE BY:
A. Resurface lanes 13 through 24.. (1-12 resurfaced 3rd qtr, FY-XX.)	6000.00	20 JUN
B. Rehab the 7-10 Snack Bar:		01 APR
• new counters and booths.	3600.00	
• resurface tile floor.	5600.00	
• new grill.	900.00	
• pizza oven.	3200.00	
• replace ice machine.	550.00	
• new menu board.	450.00	
C. Install electronic scorers for all lanes.	115,000.00	10 JUN
D. Rehab Storeroom B as an amusement game room.	23,000.00	15 MAR
E. Replace ball polishers on south end.	2,600.00	01 NOV
F. Replace rental lockers both ends.	6,500.00	01 NOV

Gina Davies

Gina Davies
Bowling Center Manager

SAMPLE

Step 5 Determine if response to correspondence is needed:

IF THE CORRESPONDENCE:	AND	THEN:
Is for information purposes only.	Requires **NO** response.	1. Do one of the following: • Read and discard. **-OR-** • Read and file. **-OR-** • Read and post. **-OR-** • Read and forward as needed. 2. If you have more correspondence to review, return to Step 4. 3. If not, **STOP HERE**.
Is for information purposes only.	Requires response from someone other than you.	1. Delegate or forward for action. 2. Follow up as needed.
Requires response from you by content or annotations.	The response needs to be written.	Go to Task 9.2
	The response can be other than written.	1. Consider responding by one or more of the following methods: • Telephone. • E-mail. • Fax. • Personal visit.

NOTE: Your local policy may provide protocol/etiquette guidance for use of e-mail and fax. If NOT, use the following:

- Use regular sentence case. (All CAPS is generally considered rude as it is read as if you are SHOUTING!)
- Identify yourself as the sender.
- Include return address or phone numbers.
- Ensure correct grammar and spelling.

DOCUMENTS

Step 6 Review ***documents*** to identify the parts that apply to your Program, to your staff's duties and tasks, or to your duties and tasks.

Check for the following:

- ☐ Forwarding/distribution requirements.
- ☐ Filing/posting requirements.
- ☐ Action required.

Step 7 Determine appropriate action:

IF:	THEN:
NO action is required.	1. Date and file the document. **-OR-** 2. Discard the document.
Action required.	1. Take appropriate steps which may include: • Review, reject, return. • Review, approve, sign. • Review and forward. • Review and return. • Post, etc.

DIRECTIVES, INSTRUCTION, and/or ORDERS

Step 8 Read ***directives, instructions, and/or orders*** to identify the parts that apply to your Program, to your staff's duties and tasks, or your duties and tasks. (See Task 9.4, Locate, Maintain, Interpret, and Apply Official Policies and Instructions.)

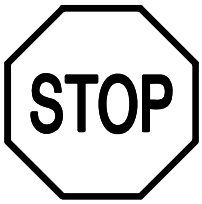
Check the following:

- ☐ Impact on your operation.
- ☐ Response/actions required.
- ☐ Forwarding/dissemination requirements.

NOTE:	Not "knowing" policy is a frequent "hit" on managers and supervisors in any organization; especially when something goes wrong. Reading, and in some cases, studying, "dog-earing", tabbing with Post-Its®, etc., and staying abreast of all ***directives, instructions, and/or orders*** (official policy) is a major management responsibility. When things go wrong (and they will), saying, "I didn't know that" is a weak and usually an unacceptable response/defense. Less things will go wrong when you operate according to applicable official policy. "Knowing" when official policy applies is your responsibility.

Step 9 Determine appropriate action.

IF DIRECTIVE, INSTRUCTION, NOTICE:	AND:	THEN:
Does **NOT** impact your operation.	Needs no further action.	1. File. **OR-** 2. Discard.
	Others need to see it.	1. Initial. 2. Date. 3. Forward or post.
Impacts your operation.	→	1. Draft changes as applicable to the following Program documents: • Your operational SOPs. (Refer to Task 9.3, Develop Internal Policies/Procedures (SOPs). • Internal policies. • Strategic plans. • Mission statements. • Budget submissions. • Goals and objectives, etc. 2. Get approval for these changes. 3. Publish/distribute the changes. 4. Monitor for compliance.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 9.0 - OVERSEE ADMINISTRATION

TASK 9.2

Prepare Correspondence

DO THIS TASK WHEN

- You have been *directed* to prepare initial/original correspondence.
- You are *responding* to correspondence you have received.
- You are *initiating* written correspondence. (E.g., thank-yous, vendor correspondence, requests for info, contract or work specifications, justifications, etc.)
- You have to provide input to a Marine Corps/Navy message.
- You need to send information via e-mail or Internet.
- You need to write a point paper.
- You need to write a Memorandum for the Record.

REFERENCES

- MCO P5215.1, Marine Corps Directives System.
- SECNAVINST 5216.5 (series), Department of the Navy Correspondence Manual.
- MCO 5216.20, HQMC Supplement to the Department of the Navy Correspondence Manual.
- Your MCCS Program standard operating procedure (SOP) on reviewing, preparing, and managing correspondence.

REFERENCES (cont.)

- Your Command's correspondence manual and/or SOP on reviewing, preparing, and managing correspondence.
- SECNAVINST 5215.1 (series), Department of the Navy Directives Issuance System.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- The Gregg Reference Manual, William H. Sabin, Macmillian/McGraw-Hill, Mission Hills, CA, 1999.
- Publication Manual of the American Psychological Association, Lancaster Press, Lancaster, PA, 2001.
- The Elements of Style, William Strunk and E. B. White, Allyn & Bacon Publishing, New York, NY, Nov 1999.
- A Manual For Writers, Kate L. Turabian, University of Chicago Press, Chicago, IL, 1996.
- U.S. Government Printing Office (GPO) Style Manual.

SUPPLIES/ RESOURCES

- Navy Writing Guidelines. (See end of this Task.)
- Pre-printed letterhead paper and memo forms.
- Plain bond paper.
- Routing slips.
- Local file system.
- Dictionary and thesaurus.
- Computer with word processing software.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Correspondence is written in accordance with Navy and/or local standards appropriate to the intended recipient of the correspondence.
- Your intended message, point, or information is clearly communicated.
- The requested/required correspondence is prepared and forwarded on time.
- Your correspondence:
  - Is accurate and effective.
  - Is technically correct, legal and authorized.
  - References local or higher headquarters' directives, instructions, notices, and/or correspondence when applicable.
  - Includes numbered enclosures as needed.
  - Remains within the writer's (or signee's) area of authority and responsibility as authorized by the Commanding Officer.
  - Is clear, understandable, and written at appropriate reading level.
  - Is prepared using appropriate, standardized format.
  - Is written using correct grammar and short, concise, specific, and complete sentences.
  - Is free of spelling and typographical errors.
  - Is logically organized.
  - Deals with a single subject, while completely covering the subject. Nothing is assumed or left to interpretation.
  - Uses a standardized numbering system determined by the MCCS Director, local policy, or the Standard Subject Identification Code (SSIC).
  - Indicates routing and distribution.

NOTES

If you are like most of your colleagues, you would prefer to accomplish all your business communication face-to-face or by phone. Unfortunately this is not possible. Sometimes the information is very complex and is best communicated in writing. There are also times when a written response is directed, or otherwise mandatory, such as a response to an inspection report.

Unfortunately, poor writing skills are common among business people today. Those who ***can*** communicate well on paper distinguish themselves to their superiors. How well you write is a direct reflection of you as a professional.

Top notch professionals--people who get promoted--need expertise in at least these three areas:

(1) Their professional area. (E.g., child development, golf, food and beverage, outdoor recreation, etc.)

(2) Financial management. (E.g., budgets, financial reports, financial projections, etc.)

(3) Writing and interpersonal communication skills.

This task will show you how to prepare the various types of correspondence used within MCCS, the Marine Corps and the Navy, and it will help you decide which type to use.

This task cannot help you become a better writer. If writing correctly and effectively is a weak area for you, get help! Take a writing course, go to writing workshops, and take every opportunity to get feedback on your writing efforts from good writers.

If you follow the steps in this task, the job of ***preparing*** correspondence can be less painful.

NOTES (cont.)

For the purposes of this task the following terms are provided as a guide:

- Messages: Sometimes referred to as "Naval Messages", are the telegrams of the Navy and Marine Corps. They are electronically transmitted and are used most often to communicate with ships (both at sea and in port) and for issues that need the personal attention of the Commanding Officer. They are written using a specialized computer software named, Turbo-Prep, a message transfer format (MTF) editor. This software is typically installed in either your MCCS Program's or the Command's Admin Office.

- Correspondence: Written communication in any of the following formats:

  Memorandum: Used in one of several formats designed to suit the subject, occasion or audience, as an informal way to correspond routinely within and between activities.

  Business letter: Used to correspond with agencies, businesses, or individuals outside DoD who may be unfamiliar with the format and conventions of the Standard Letter. May also be used for official correspondence within DoD when the occasion requires a personal approach.

  Standard Letter: Used in one or more variations to correspond officially with addressees within the Department of Defense (DoD). May also be used to write outside DoD sources if they have adopted this format. Examples of outside sources include the Coast Guard and some contractors doing business with the Navy or Marine Corps.

NOTES (cont.)

- Documents: Can include any of the following:

  - After-action reports.
  - Accident/incident/injury/illness reports.
  - Activity/event evaluations.
  - Budget summaries/reports.
  - Daily Activity Reports (DARs).
  - Financial statements.
  - Hot line reports.
  - Inspection reports.
  - Inspector General (IG) reports.
  - Performance evaluations.
  - Position descriptions (PDs).
  - Progress reports.
  - SOPs.
  - Travel orders/claims, etc.

- Directives, Instructions and/or Orders: Can include any of the following:

  - DoD instructions.
  - DON Instructions/Marine Corps Orders.
  - Command instructions.
  - Local MCCS instructions.
  - Policy manuals.
  - Operational guides.
  - Official orders, etc.

NOTE: Directives, instructions and orders, as the names imply, detail Marine Corps/Navy/DoD policy, rules, regulations, instructions, warnings, cautions, restrictions, limitations, responsibilities, application, etc.

Directives and instructions are permanent in nature and are in force until changed, superseded, or cancelled.

Orders are temporary in nature and "usually" bear a cancellation date.

NOTES (cont.)

- Point Papers: Used in either of two formats. One that is written to provide information only. The other is written to provide information and request a decision.

  - Both formats are normally used to summarize information on a specific topic at the request of a superior. The information provided may be used to help in the decision process or simply to provide information. Senior officials are often most comfortable with this means of communication, ***meaning that you need to become proficient in their use.***

  - A point paper provides essential points in a minimum number of words. It serves as a readily available source of condensed factual information on a topic, program, problem, facility, situation, etc.

Any time you are required to write (or provide information/ input) any type of correspondence, consult SECNAVINST 5216.5 (series), Navy Correspondence Manual and P5216.20, HQMC Supplement to the Department of the Navy (DON) Correspondence Manual.

You will find thorough guidance on the rules of writing in The Gregg Reference Manual, written by William H. Sabin, and published by Macmillian/McGraw-Hill, Mission Hills, California. (Use the most recent edition.)

Formatting information and examples are provided at the end of this task.

PROCEDURE

Step 1 Review your local MCCS Program and Command instructions and SOPs about preparing correspondence when writing any of the following.

- Memorandum.
- Point papers.
- Message.
- Documents.
- E-mail.
- Business letters.
- Standard letter.
- SOPs.
- Fax.
- Directives, instructions, and orders.

Step 2 Ask your immediate supervisor/manager to define the preferred correspondence/communication methods that you and your staff are expected to use.

Step 3 Ensure you and your staff use the electronic communication technologies per DoD, Navy, Marine Corps and local instructions, policy, practice, and SOPs.

☐ Review all local directives, instructions, notices, and SOPs detailing the appropriate and official use of electronic communication technologies. (E.g., telecommunications, Internet, e-mail, fax, etc.)

☐ In the absence of any local/official guidance, ensure all your electronic communications are:

- Authorized.
- Ethical.
- Professional.
- Politically correct.
- For official business.
- Legal.
- Fair and unbiased.
- NOT offensive, racist, or sexist.

☐ Ensure these paperless, electronic correspondence methods meet the standards listed on page 9.2.3 at the, “This Task Is Done Correctly When...” section.

Step 4 Select appropriate method of corresponding.

IF YOU NEED TO:	THEN PREPARE AND SEND A:
Correspond informally within your Command or among several Commands. **-OR-** Write a Memorandum for the Record or Of Agreement.	Memorandum. Go to Step 5.
Correspond with agencies or individuals outside of DoD who may not be familiar with the Standard Letter. (E.g., commercial vendors.)	Business Letter. Go to Step 12.
Prepare official correspondence within DON/ Marine Corps but the occasion calls for a more personal approach. (E.g., for condolences or congratulations.)	
Prepare a routine business correspondence. (E.g., for "Thank You" letters to volunteers.)	
Prepare information in a Point Paper format per direction or by your election.	Point Paper. Go to Step 20.
Prepare official correspondence from your Command, to addressee(s) within DoD that will be signed by the CO or by the MCCS Director using "by direction" authority.	Standard Letter. Go to Step 27.
Communicate with field commands. **-OR-** Submit a request for area/theater clearance. **-OR-** Get the personal attention of specific COs. **-OR-** Reach many Marine Corps Commands. **-OR-** Respond by message as directed.	Message. Go to Step 35.

MEMORANDUMS

Step 5 Prepare a draft **memorandum** using the format guidance provided on pages, Correspondence-0 through Correspondence-5. (See the pages titled, Directions #1-#3 and Examples #1-#3 at the end of this task.)

- If needed, discuss the content of the memorandum with your immediate supervisor/manager before preparing.
- Revise as appropriate to the directions, examples and/or discussion.

NOTE: There are several types of memorandums. Review the references to ensure you use the correct one.

Types of memorandums include:

- Printed Memorandum Form.
- Letterhead Memorandum.
- Plain-Paper Memorandum.
- Memorandum for the Record.
- Memorandum of Understanding (MOU).
- Memorandum of Agreement (MOA).

Step 6 Give your memorandum (and everything you write) a "cool-off" period of one or more days unless there is a requirement to send the memorandum/ correspondence as soon as possible.

NOTE: A "cool-off" period is useful when you are writing about something contentious or about which you are angry or passionate.

Reviewing your work a few days after your initial drafting will usually result in a more professional and effective effort. In addition to perhaps "cooling down", you may have given the subject more thought, discussed it several times, and perhaps changed your initial opinion/reaction.

Step 7 Prepare smooth memorandum from your revised draft.

Ensure the following:

- ☐ The memorandum is dated.
- ☐ The "To:" and "From:" addressees are correct. ***(The "To:" and "From:" are not necessary in a Memo for the Record.)***
- ☐ Routing is shown in the "Via:" line(s), if applicable.
- ☐ The "Subj:" (subject) reflects the content of the memorandum.
- ☐ The "Subj:" (subject) is in all upper case letters.
- ☐ References, if applicable, are listed in the "Ref:" line(s).
  - Ensure each reference is germane to the memo and is listed in the order in which referred to in the body of the memo.
  - Ensure each reference is identified alphabetically: (a), (b), (c), etc.
- ☐ Enclosures, if applicable, are listed in the "Encl:" line(s).
  - Ensure each enclosure is germane to the memo and is listed in the order in which referred to in the body of the memo.
  - Ensure each enclosure is identified numerically: (1), (2), (3), etc.
- ☐ Body of the memorandum is:
  - ☐ To the point.
  - ☐ Falls within subject title.
  - ☐ Checked for sentence structure.
  - ☐ Free of spelling, grammar, and punctuation errors.
- ☐ Paragraphs are numbered.
- ☐ Routing copies are indicated by "Copy To:", if applicable.
- ☐ Signature block, if required, is correct for actual signer.

Step 8 Review the signature block, if used, and determine if the memorandum is to be signed in-house or to be sent to someone else.

Step 9 Do a final review for spelling, grammar, punctuation, and format before signing or forwarding for signature.

> **NOTE:** Don't rely completely on the "spell check" features of your word processing software for this final review. As the originator, you are responsible for the accuracy of the content and the format.
>
> Good proof readers read a document backwards to check for spelling and word-use errors that "spell check" will not catch.

Step 10 Distribute/forward memorandum per local policy and practice.

Step 11 Put a copy of the memorandum in your files per local policy and practice.

STOP HERE!

Return to Step 4 if you have other correspondence to prepare.

BUSINESS LETTER FORMAT

Step 12 Prepare a draft **business letter** using the format guidance provided on pages, Correspondence-6 through Correspondence-14. (See pages titled Directions #4 - #7 and Examples #4 - #7 at the end of this task.)

- If the business letter is to be forwarded for signature, discuss the content with your immediate supervisor/manager before final preparation.
- Revise as appropriate to the directions, examples and/or discussion.

Step 13 Give your business letter (and everything you write) a "cool-off" period of one or more days unless there is a requirement to send the letter as soon as possible.

(Read note box after Step 6 on page 9.2.11.)

Step 14 Prepare smooth business letter from your revised draft.

Ensure the following:

- ☐ Correct letterhead is used, if applicable to selected format.
- ☐ Date included and correct. (Typically the day the letter is to be signed/mailed.)
- ☐ The addresses are correct.
- ☐ Subject, if used, is written in upper case letters reflecting content/purpose of the letter.
- ☐ Body of the letter is:
  - ☐ To the point.
  - ☐ Within subject.
  - ☐ Checked for sentence structure.
  - ☐ Free of spelling, grammar, and punctuation errors.

Step 14 (cont.)

- ☐ Signature block is correct for actual signer.
- ☐ All enclosures are listed and numbered.
- ☐ A "Copy To:" if included, is in the correct order.

Step 15 Determine who will sign the letter and prepare the signature block accordingly.

Step 16 Do a final review for spelling, grammar, punctuation, and format before signing or forwarding for signature.

> **NOTE:** Don't rely completely on the "spell check" features of your word processing software for this final review. As the originator, you are responsible for the accuracy of the content and the format.
>
> Good proof readers read a document backwards to check for spelling or word-use errors that "spell check" will not catch.

Step 17 Prepare the mailing and return address labels/envelope per current Marine Corps mail instructions.

Step 18 Mail the letter per local policy.

Step 19 Put a copy in your files per local policy and practice.

STOP HERE!

Return to Step 4 if you have other correspondence to prepare.

POINT PAPER FORMAT

Step 20 Gather all the information, facts, figures, reports, etc., that relate to the subject for which you have been requested to write the point paper.

NOTE:	There are several formats used for point papers. The example provided at the end of this task differs slightly from the one found in the Marine Corps Correspondence Manual, but it is the one most commonly accepted for an *unclassified* point paper.

Step 21 Prepare a draft **point paper** using the format guidance provided on page, Correspondence - 16. (See pages titled Directions #8 and Example #8 at the end of this task.)

- ☐ If needed, discuss the content of the point paper with your immediate supervisor/manager before preparing.
- ☐ Revise as appropriate to the directions, examples and/or discussion.

Ensure the following:

- ☐ Information is complete and factual.
- ☐ Abbreviations and acronyms are spelled out at the first point of use.
- ☐ Technical terms and phrases are written in plain language.

Step 22 Give your point paper (and everything you write) a “cool-off” period of one or more days unless there is a requirement to forward the point paper as soon as possible.

(Read note box after Step 6 on page 9.2.11.)

Step 23 Prepare smooth point paper from your revised draft.

Ensure the following:

- ☐ The point paper is dated.
- ☐ Preparer's name, rank, office code, and phone number are included and accurate.
- ☐ Subject is included, written in upper case, and reflects content.
- ☐ Background paragraph:
  - ☐ Heading is centered, capitalized, and underlined.
  - ☐ Tells why you are writing the paper.
  - ☐ Is brief and to the point.
  - ☐ Is presented clearly and/or graphically.
- ☐ Discussion paragraph:
  - ☐ Heading is centered, capitalized, and underlined.
  - ☐ Contains information related to:
    - Relevant problems/issues.
    - Pros and cons.
    - Present status.
    - Outlook for the future.
  - ☐ Concisely written in bulletized format.
  - ☐ Phrases instead of full sentences used.
  - ☐ Data presented in graphics where possible.
  - ☐ Labeled tabs used for supplemental information.

NOTE:	Tabs, when used to enclose and separate the attachments that are referenced in point paper, are labeled (A, B, C, etc.). These attachments generally contain supplementary and supporting information or data.

- ☐ Recommendation paragraph:
  - ☐ Heading is centered, capitalized, and underlined.
  - ☐ States the recommended approach. If there is no recommendation then states, "Provided for information only".

Step 24 Review the final point paper to ensure:

- ☐ Cascading indentation is used to organize subordinate points.
- ☐ Information and data has been checked for accuracy.
- ☐ The paper is a single page (8½" X 11" with 1" margins).
- ☐ Bullet tick marks and wrap around lines are aligned.
- ☐ Double spacing is used between paragraphs and bullets.
- ☐ Paper is free of spelling, grammar, and punctuation errors.

NOTE:	Don't rely completely on the "spell check" features of your word processing software for this final review. As the originator, you are responsible for the accuracy of the content and the format. Good proof readers read a document backwards to check for spelling or word use errors that "spell check" will not catch.

Step 25 Forward point paper with any supplementary information to requesting person.

Step 26 Put a copy in your files per local policy and practice.

STOP HERE!

Return to Step 4 if you have other correspondence to prepare.

STANDARD LETTER FORMAT

Step 27 Prepare a draft **standard letter** using the format guidance provided on page, Correspondence-18. (See pages titled Directions #9 and Example #9 at the end of this task.)

- If needed, discuss the content of the standard letter with your immediate supervisor/manager before preparing.
- Revise as appropriate to the directions, examples and/or discussion.

Step 28 Give your standard letter (and everything you write) a “cool-off” period of one or more days unless there is a requirement to send the letter as soon as possible.

(Read note box after Step 6 on page 9.2.11.)

Step 29 Prepare smooth standard letter from your revised draft.

- Use the example at the end of this task.

Ensure the following:

☐ Correct letterhead is being used.

☐ Codes and date are included and correct.

☐ Addressees, to and from, are correct.

☐ Subject is included, written in upper case, and reflects content.

☐ References listed are required, are in the correct format, and are listed in the same order that they are used in the body of the letter.

☐ Enclosures are listed and available, and are listed in the same order they are used in the body of the letter.

☐ Body of the letter is:

- ☐ To the point.
- ☐ Falls within subject.
- ☐ Checked for sentence structure.
- ☐ Free of spelling, grammar, and punctuation errors.

☐ Paragraphs are numbered.

☐ Signature block is correct for actual signer.

☐ A "Copy To:" line is included if required and is in the order of seniority.

Step 30 Do a final review for spelling, grammar, punctuation, and format before signing or forwarding for signature.

NOTE:	Don't rely completely on the "spell check" features of your word processing software for this final review. As the originator, you are responsible for the accuracy of the content and the format. Good proof readers read a document backwards to check for spelling or word use errors that "spell check" will not catch.

Step 31 Prepare the mailing and return address labels/envelope per current Marine Corps mail instructions.

Step 32 Review the signature block and sign or forward (if the letter is to be signed by someone else) for signature.

Step 33 Mail, forward, or distribute per local policy and practice.

Step 34 Put a copy in your files per local policy and practice.

STOP HERE!

Return to Step 4 if you have other correspondence to prepare.

MESSAGE FORMAT

Step 35 Prepare a draft of the text/content for your **message** using the guidance provided on page, Correspondence-22. (See pages titled, Directions #10 and Example #10 at the end of this task.)

- If needed, discuss the content with your immediate supervisor/ manager and the person responsible for entering the message text into the MTF Editor.
- Respond to messages per local procedure, practice, or policy.

Ensure the following and revise as appropriate:

☐ Addressees, To and From, are correct.

☐ Subject is included and reflects content.

☐ References are included and correct.

☐ Points-of-Contact (POCs) are listed, if applicable.

☐ Body of the message is:

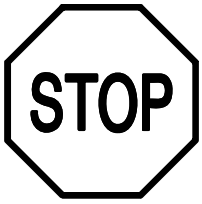
- ☐ To the point.
- ☐ Falls within subject.
- ☐ Checked for sentence structure.
- ☐ Free of spelling, grammar, and punctuation errors.

Step 36 Give your message input (and everything you write) a “cool-off” period of one or more days unless there is a requirement to send the message as soon as possible. (Priority messages usually require a response within 48-hours.)

(Read note box after Step 6 on page 9.2.11.)

Step 37 Give corrected draft to person responsible for Turbo-Prep, the message transfer format (MTF) editor input for final preparation and dispatch, per local procedure. (E.g., your immediate supervisor/manager, Base/MCCS Admin, Communications Center, etc.)

Step 38 Put a copy in your files per local policy and practice.



Congratulations! You've completed this task.

CORRESPONDENCE DIRECTIONS & EXAMPLES

DIRECTIONS # 1
PLAIN PAPER MEMORANDUM

DD MMM YY

MEMORANDUM

From: Job title of person who originates the memo
To: Job title of person to whom the memo is sent
Via: Job title of person(s) through whom the memo is routed

Subj: WRITING A PLAIN-PAPER MEMORANDUM

Ref: (a) SECNAVINST 5216.5D

1. The plain-paper memorandum is authorized for use within your Program/ Command. It conveys the same degree of informality as does the printed memorandum form, but it permits more latitude for using multiple addresses, via addresses, or both.

2. The plain-paper memorandum is prepared on plain white bond paper, with one-inch margins at the top, bottom and sides. Note that the word "MEMORANDUM" is typed in all capitals above the "From" line. It resembles the letterhead memorandum in format except that it requires only a date rather than the full originator identification symbols. Additionally, the "From:", "To:", and "Via:" lines do not require full identification, but may consist only of name, title or code. Reference (Ref:) and Enclosure (Encl:) lines may also be used and are in the same format as the printed memorandum form.

3. The informality of a plain-paper memorandum allows a "Via" addressee to provide an endorsement simply by initialing next to their name, title or code. Comments may also be hand-written on the memorandum. Technical advances and office automation have made desk-top computers the medium of choice for preparing correspondence.
It is much easier to prepare a typed endorsement on a second page, using a desk-top computer, than to use a typewriter and try to make it fit as a same-page endorsement. More formal endorsement comments should be prepared on a second page following the procedures outlined in Reference (a)--the Department of the Navy Correspondence Manual.

4. Since the plain-paper memorandum contains a "From" line which identifies the originator, the signature block consists of the typed name (in all capitals) without any military rank or title begun at the vertical center of the page.

FIRST and LAST NAME

EXAMPLE # 1
PLAIN-PAPER MEMORANDUM

20 July XX

MEMORANDUM

From: Athletic Director
To: Gymnasium Attendants
Via: Assistant Athletic Director

Subj: NEW HOURS OF OPERATION

Ref: (a) MCCS AC/S, Director memo of 15 July XX

1. In order to better serve the users of the athletic program and facilities, effective 1 August the new hours of the Hillman Gymnasium will be 0600 to 2200 Sunday through Friday and 0700 to 2300 Saturday.

2. Operations of all facilities and services within the Hillman Gymnasium will reflect these new hours as directed in reference (a).

3. The new work schedule will reflect the change in hours. Please be sure to check the employee bulletin board for your hours of work. You should see your supervisor if you have any questions or concerns. Please feel free to speak to me directly if you need to do so.

4. Let's all work together to make this change positive, first and foremost for our customer, but also for the entire staff of the Hillman Gymnasium.

Robert Woodson

ROBERT WOODSON

SAMPLE

DIRECTIONS # 2
MEMORANDUM FOR THE RECORD

MM/DD/YR

MEMORANDUM FOR THE RECORD

Subj: PURPOSE/SUBJECT OF THE MEMORANDUM

1. Use a Memorandum for the Record as an internal document (a memo to yourself), to record information that isn't kept anywhere else. Examples include the results of an important meeting or telephone conversation, an oral agreement, or the reasoning behind a controversial decision made by you or someone senior to you.

2. It is possible in your career that someone senior to you will direct you to do something that isn't authorized or is questionable--either ethically or legally. After you have advised your senior what the policy says and what the correct approach (in your opinion) should be, and the senior directs you proceed anyway, it may be advisable to document your actions with a Memorandum for the Record.

3. A Memorandum for the Record does not relieve you of your responsibilities under the Standards of Conduct. Check with your local ethics counselor if you believe the decision may cause problems for you or your Command at a later date. For further information on the Standards of Conduct, see Task 9.4, Locate, Maintain, Interpret, and Apply Policy and your Standards of Conduct handout.

4. The Memorandum for the Record is the most informal of all the memorandum forms. It can be handwritten and does not require all the formality of other memorandums. At a minimum, it should be dated, signed, and show the signer's organizational code or title. File the Memorandum for the Record in your project/event files or wherever you would be most likely to look for it should the issue be raised at a later date.

First Last
Title

EXAMPLE # 2
MEMORANDUM FOR THE RECORD

06/11/XX

MEMORANDUM FOR THE RECORD

Subj: FREE USE OF SWIMMING POOL BY GROVES ELEMENTARY SCHOOL

1. On 8 June I was advised by the MCCS AC/S, Director, Mr. Tate, that the Marine Corps Base's Groves Elementary School would be permitted free use of the base pool for recreational swimming. Approximately 40 children, ages 8-12, will be accompanied by teachers and teacher's aides for each 60 minute session, three times each week for six weeks.

2. Free use by these children presents a loss of income, not to mention the staffing requirements which the Aquatics Program is required to provide. The potentially significant loss of income from these children and the additional expense to the Aquatics Program for two lifeguards will be offset by a negotiated agreement between Mr. Tate and the Groves Elementary School principal, Ms. Stevens. The agreement will allow the Marine Corps Base Youth Center to use classroom and playground facilities for the After School Program. In addition, Mr. Tate assured me that the Aquatics Program would not suffer from a budget that is sure to be in the red by late summer.

SAMPLE

Richard Williams

Richard Williams
Aquatics Program Director

DIRECTIONS # 3
PRINTED "FROM-TO" MEMORANDUM

Memorandum

DATE: DD MMM YY

FROM: Name of person who originates the memo

TO: Name of person to whom the memo is sent

SUBJ: USING THE PRINTED MEMORANDUM FORM

Ref: (a) SECNAVINST 5216.5D

Encl: (1) Work schedule

1. The printed memorandum form and the plain-paper memorandum are the most informal types of memorandum. Like the plain-paper memorandum, you can use it among individuals and offices within the same activity/command.

2. The memorandum form comes in two sizes, either of which may be available and used in your organization.

   a. (8 ½ by 11 inches).

   b. (8 ½ by 5 ½ inches).

3. Use names, titles or codes in the "From:" and "To:" blocks.

4. Reference ("Ref:") and Enclosure ("Encl:") headings are typed under the pre-printed headings. Note reference (a) and enclosure (1). No file copy is necessary when the subject matter is insignificant or short-lived.

5. Very informal memorandums may be handwritten. Whether typed or not, allow a 1 inch left margin.

6. The writer signs his or her name without an authority line.

First Last Name

EXAMPLE # 3
PRINTED "FROM-TO" MEMORANDUM

Memorandum

DATE: 19 Nov XX

FROM: Jenny Davis, MCCS Marketing Manager, Marine Corps Base Desertville

TO: LT Marianne Rogers, Public Affairs Officer, Marine Corps Base Desertville

SUBJ: CHRISTMAS AND NEW YEARS' HOLIDAY RECREATION PROGRAMS MEDIA COVERAGE

Encl: (1) Holiday programming schedule of events
(2) Event Coverage Request Form

1. Throughout the month of December and the first week of January, the MCCS Program is conducting an exceptional variety and number of special activities and events to help celebrate the holiday season. The target audience for most of these activities are the single Marines, both men and women, who are stationed aboard the Marine Corps Base and will be unable to go home to family and friends during this time of year. Many other activities and events are being planned with the family in mind. The MCCS Program will focus its efforts on providing free or low-cost recreational opportunities as our gift to the single Marines stationed here at Desertville.

2. Enclosure (1) includes a schedule as well as all the pertinent information about each activity and event. An Event Coverage Request Form, Enclosure (2), is also submitted in order that MCCS receive maximum publicity exposure for the Holiday Recreation Programs. We certainly hope that you and your staff can attend these events and provide us with photographs, participant interviews and print coverage in the Golden Eagle newspaper.

3. Lastly, personal invitations are being sent to you and your staff to join us at the Consolidated Club on New Years' Day for the 2nd Annual Cactus Bowl and post-game party. Fun things happen there, and you won't want to miss it! See you there.

Jenny Davis
Jenny Davis

SAMPLE

DIRECTIONS # 4
PLAIN-PAPER
BLOCK STYLE BUSINESS LETTER

1. Begin all lines at the left margin. No part of the letter is indented except for displayed quotations, tables, and similar material.

2. Begin return address on the first line below the top margin of 1 -2 inches.

3. The following return address information is provided on three or more single-spaced lines:

   - Branch/Department
   - Building number or street address
   - Command
   - City, State and Zip Code
   - Phone number (if you want the addressee to have it)
   - Date

4. If the return address looks a little overwhelming at the top of your page you may position it in the closing section of your letter, starting on the line directly below the writer's typed name. In this case, the date will be typed on the first line below the top margin. The rules for modified-block and block style letters apply in regards to aligning the return address at the center or left margin.

5. The inside address begins 2 lines after the date at the left margin. Two lines after the inside address is the salutation, punctuated by a colon.

6. The example block style letter is obviously one of a personal nature to a close friend and business associate. The writer used what appears to be their home address, rather than work, for the return address. The salutation in this letter also addressed the individual by their first name and was punctuated with a comma, rather than a colon. A salutation such as this is acceptable when writing to a personal or business associate on items largely outside of business.

7. Paragraphs are double-spaced and the body of the letter is single-spaced, unless the letter is unusually short (8 lines or less). In these instances you may double space the letter body and set larger margins in order to "balance" the letter on the page.

EXAMPLE # 4
PLAIN-PAPER BUSINESS LETTER
BLOCK STYLE

6900 Skyline Drive
San Diego, CA 97373
March 23, FYXX

Ms. Karen Leonard
Community Events Director
Porterville Leisure Services Dept.
725 Orangedale Road
Porterville, CA 93289

Dear Karen,

What a pleasure it was to see you again at the conference last week. I miss the great times we had programming at the center in San Louis for so many years. We really did put on some great activities and events.

You mentioned at the conference about a marketing and promotions guide that you had prepared for the Porterville program. It sounds terrific! I'd like to purchase a copy for my program. There are several other managers that could certainly utilize some "good ole' how-to" information on program marketing and promotions also. Let me know how much the guide costs and I will send you a check. After receiving it, I'll review it to determine its applicability to our other branches. If it looks like we can use it, I'll submit a purchase order for the purchase of an additional 15-18 guides.

I'm glad to hear that your special events programmers were able to use the calendar I gave you. I will definitely look forward to hearing about their successful events--maybe we'll be able to use some of their ideas too! Thanks again for the information on the marketing and promotions guide. Give me a call at (619) 555-1212 ext. 25. I look forward to hearing from you soon.

Sincerely,

Gretchen Bauer

Gretchen Bauer, CLP

SAMPLE

DIRECTIONS # 5
PLAIN-PAPER BUSINESS LETTER
MODIFIED-BLOCK STYLE WITH INDENTED PARAGRAPHS

1. Begin return address, complimentary closing and writer's signature and identification at the center.

2. Begin all other lines at the left margin, with the exception of the first line of each paragraph, which is indented approximately 2 inch (4 - 5 spaces depending on font size).

3. The following return address information is provided on three or more single-spaced lines:

   - Branch/Department
   - Building number or street address
   - Command
   - City, State and Zip Code
   - Phone number (if you want the addressee to have it)
   - Date

4. If the return address looks a little overwhelming at the top of your page you may position it in the closing section of your letter, starting on the line directly below the writer's typed name. In this case, the date will be typed on the first line below the top margin. The rules for modified-block and block style letters apply in regards to aligning the return address at the center or left margin.

EXAMPLE # 5
PLAIN-PAPER BUSINESS LETTER
MODIFIED-BLOCK STYLE WITH INDENTED PARAGRAPHS

Youth Activities Branch
Marine Corps Community Services
Building 300
Marine Corps Base
Quantico, VA 22134-5099
March 23, FYXX

Master Sergeant and Mrs. Charles Davis
217 Oriskany Lane
Marine Corps Base
Quantico, VA 22134

Dear Master Sergeant and Mrs. Davis:

Thank you for taking the time to complete the Customer Service Comment Card while at the Youth Center on Tuesday. It is because of concerned and caring parents such as yourselves that we have the opportunity to raise awareness of the program and correct problems brought to our attention.

Despite our best efforts at planning and preparation for this week's Spring Day Camp, the events of Tuesday afternoon took us completely by surprise. The fire alarm sounded just minutes before you came to pick up your children, Jeff and Sarah. Not realizing it was simply a false alarm activated by an electrical malfunction, and at no time was the safety of the children or staff in jeopardy, the standard procedure to quickly and safely evacuate the building was followed. It is unfortunate that due to the heavy rains and mud outside the center, many of the children were soaked, cold and muddied in the short time that it took the base fire department and security to respond. Outside play, a key element of our program offerings, although initially on our activity schedule that day, had already been canceled when it began to sprinkle earlier in the morning. I intend to meet with the MCCS AC/S, Director, Ms. Kennedy, to explore alternative solutions, such as a covered and paved area, far enough from the building to comply with fire department policies, yet provide the children with a safe and dry place during such events as fire drills. We could certainly use such a facility for many of our outside program activities as well.

Thank you again for bringing to my attention your concerns about the Spring Day Camp and other Youth Activities Programs. I am always available if you wish to call or would like a personal meeting.

Sincerely,

Karen Simcox

Karen Simcox
Youth Activities Director

SAMPLE

DIRECTIONS # 6
PLAIN-PAPER BUSINESS LETTER
MODIFIED-BLOCK STYLE

Current surveys indicate that this is the style most commonly used.

1. Begin return address, date line, the complimentary closing and the writer's signature and identification at the center of the page. Begin return address on the first line below the top margin of 1 - 2 inches.

   If the return address looks a little overwhelming at the top of your page you may position it in the closing section of your letter, starting on the line directly below the writer's typed name. In this case, the date will be typed on the first line below the top margin. The rules for modified-block and block style letters apply in regards to aligning the return address at the center or left margin.

2. Begin all other lines at the left margin.

3. The following return address information is provided on three or more single-spaced lines:

   - Branch/Department
   - Building number or street address
   - Command
   - City, State and Zip Code
   - Phone number (if you want the addressee to have it)
   - Date

4. The inside address begins 2 lines after the date at the left margin. Two lines after the inside address is the salutation, punctuated by a colon.

5. Paragraphs are double-spaced and the body of the letter is single-spaced, unless the letter is unusually short (8 lines or less). In these instances you may double space the letter body and set larger margins in order to "balance" the letter on the page.

EXAMPLE # 6
PLAIN-PAPER BUSINESS LETTER
MODIFIED-BLOCK STYLE

River Links Golf Course
2800 Bay View Drive
Marine Corps Air Station
Cherry Point, NC 28543
March 25, FYXX

Colonel and Mrs. Jay Sullivan
338 Tarawa Drive
Marine Corps Air Station
Cherry Point, NC 28543

Dear Colonel and Mrs. Sullivan:

Last week's "Home and Home Junior Tournament" at the Havelock Golf Course was a huge success due to your volunteer spirit and support of the Marine Corps Air Station Junior Golf Program.

Your willingness to work as volunteer officials running the on-site registration table resulted in a very efficient and customer oriented check-in process. The number of tournament entries was the largest ever, yet the customer comments and event evaluations both indicate the registration process was run "first class". Your participation as a volunteer official also allows the golf course and the Marine Corps Community Services Program to offer Junior Golf Program events at considerably less cost to the young golfer.

Thank you for joining our "family" of volunteers. I appreciate your support and look forward to a relationship which will benefit all the golfers in the community.

Sincerely,

Rick Faldo

Rick Faldo
Golf Program Manager

SAMPLE

DIRECTIONS # 7
BUSINESS LETTER
USING MCCS PROGRAM or COMMAND LETTERHEAD

It's unlikely that you would sign a letter on your base letterhead, unless you have "By Direction" authority. However, you may be directed to draft and sign a letter using your MCCS Program letterhead, if such policies exist to permit its use, and your signature.

1. Prior to typing a business letter, try to estimate the length. Set your margins to obtain maximum balance. Never use less than a 1-inch margin. For a business letter that may contain 100 words or less, there are several techniques you may use to balance the letter's appearance:

   a. Start the inside address up to eight lines below the date.
   b. Use side margins of up to two inches.
   c. Double-space throughout the body of the letter.

2. Do not number main paragraphs. Subparagraphs are numbered and lettered the same as a Standard Letter. Start a paragraph near the end of a page only if that page has room for two lines or more. Continue a paragraph on the following page only if two lines or more can be carried over. A signature page must have at least two lines of text.

3. Do not number the first page of a single page letter or multiple page letter. The first page is assumed to be page 1. Center page numbers 2-inch from the bottom edge, starting with the number 2. No punctuation accompanies a page number.

4. Subject line is optional. Begin two lines beneath salutation and type in all caps.

5. On the second and succeeding pages of a business letter start typing the identification symbols and date in the upper right corner. Skip two lines and continue your text, or start a new paragraph, on the third line. You do not use letterhead on the second or subsequent pages.

6. If you have previous communications or enclosures, which are relevant, refer to them in the body of the letter only, without calling them references or enclosures. List them as enclosures on the second line below the "signature" block. Type "Enclosures:" and follow with a number and a brief description of the enclosures (don't number when you have only one enclosure). When the enclosures are of little importance, instead of listing them with a description, you may indicate the number of enclosures in parentheses without the description. (E.g., Enclosures (2).) Materials, referred to in the letter that are being mailed separately should be noted as such.

7. To send an addressee an information copy or a courtesy copy of your letter, type "Copy to:" at the left margin, two lines below the "signature" block or two lines below any preceding notation, such as the enclosure line(s). This will be typed beginning at the center of the page on the second line below the text. All lines of the "signature" block will start at the center of the page, beginning on the fourth line below "Sincerely."

8. The signer's name will be typed in all capital letters. The military grade, where applicable, will be spelled out-not abbreviated. The signer's functional title and the authority line will follow.

9. The most common complimentary closings are used. (E.g., "sincerely", "cordially", "sincerely yours" and "cordially yours". Other informal closing phrases or sentences may be used.)

EXAMPLE # 7
(Page 1 of 2)
BUSINESS LETTER USING MCCS PROGRAM or COMMAND LETTER HEAD

MARINE CORPS COMMUNITY SERVICES PROGRAM
MARINE CORPS BASE, DESERTVILLE
DESERTVILLE, CA 95432

1710
RSD/123
March 20, FYXX

Ms. Michelle Herrera
NRPA Program Coordinator
National Recreation and
Park Association
22377 Belmont Ridge Rd.
Ashburn, VA 20148

Dear Ms. Herrera:

SUBJECT: APPRECIATION FOR SUPPORT OF REGIONAL TRAINING

Thank you for your support of the Armed Forces Recreation Society's (AFRS) Regional Training Workshop conducted last week at Marine Corps Base, Camp Pendleton. More than 75 armed forces recreation professionals representing bases throughout Southern California attended the one-day workshop. Not only were the planning committee and workshop participants pleased with the number in attendance, we were very excited about the quality of the presentations.

You had provided us the name of Dr. Ellen O'Sullivan as a possible presenter on marketing the benefits of recreation. Dr. O'Sullivan was outstanding! Her presentation was right on target with the message armed forces recreation is presenting to its customer base and to their respective commands. Her wit, humor and focus was very applicable to the front-line service provider we wanted to reach. It was also quite obvious Ms. O'Sullivan had done her "homework" too. She was comfortable in using military terms and acronyms and presented her knowledge of recreation program delivery in the military setting. There is no question that we would invite Ms. O'Sullivan to present at future AFRS sponsored workshops.

The assistance provided by the National Recreation and Park Association headquarters and Pacific Regional Offices in regards to workshop promotion and registration was outstanding. The well-designed brochures and the direct mailing to military

SAMPLE

EXAMPLE # 7
(Page 2 of 2)
BUSINESS LETTER USING MCCS PROGRAM or COMMAND LETTER HEAD

1710
RSD/123
March 20, FYXX

installations and NRPA/AFRS members was very effective in getting the word out. The number of attendees met our expectations, and this is due in part to the promotions you provided. Your office also agreed to provide a 6 month membership in NRPA to any non-member who registered for the workshop. This was a generous offer and was well-received by the attendees. I've enclosed a summary of the Workshop Evaluation for your review. Please feel free to share these very positive comments with other members of your organization.

The Regional Training Workshops coordinated by AFRS, the AFRS Regional Representatives and their planning committees are an important benefit of membership. The workshop sessions focus specifically on the intended target audience and also those who are seldom able to participate in state or national conferences. Thank you, again for supporting our Regional Training Conference. It is from interest and commitment such as you have demonstrated that will continue to make these workshops a success.

SAMPLE

Sincerely,

Kathy Mendes

KATHY MENDES, CLP
Recreation Program Director
By direction of the MCCS Director

Enclosure: Workshop Evaluation Summary
Copy to: R. Dean Tice, Executive Director, NRPA
Kathy Perales, President, AFRS
Terry Cunagin, Southern Regional Rep., AFRS

2

DIRECTIONS # 8
POINT PAPER

POINT PAPER

Rank and Name
Office Code/Phone#
Date of Preparation

Subj: SAMPLE POINT PAPER FORMAT

BACKGROUND

Tells why you are writing this paper. Brevity, clarity and graphic presentation are key ingredients. Use cascading indentation to organize subordinate points. Note that headings are in all caps, centered and underlined.

DISCUSSION

- Might contain problems. Pros and cons, present status, and outlook for the future.
- Other points that will help:
  - -- Point papers should be concisely written in bulletized format. Use phrases instead of full sentences.
  - -- They should not exceed one page. Use tabs for supplementary information.
  - -- Whenever possible, data should be presented in graphics rather than words; trend lines are helpful.
  - -- Watch how you crunch numbers. A percentage alone may mean little out of context - as compared to what?
- Type on a 8 x 11 paper with a 1" margin all around. Increase left margin if binding is anticipated.

RECOMMENDATION

State what the recommended approach should be. If no recommendation, state, "Provided for information only."

(Other Notes: Pay attention to what is capitalized and what is not (in example above). Note the type of bullet tick marks used and the indentations. Note where wrap around lines start. Double space between paragraphs and bullets.)

EXAMPLE # 8
POINT PAPER

POINT PAPER

Willard Scott NF-04
MR-696E12/555-6717
MM/DD/YY

Subj: INSTALLATION FOOD AND HOSPITALITY DIRECTOR

BACKGROUND

In order to survive with any degree of profitability, food outlets need to have direction from a single source. This source needs to have expertise and control such as found in civilian operations operating under a single control program.

DISCUSSION

- Changes in scope and size of Marine Corps installations are forcing changes to MCCS and MCX food outlets and Consolidated Dining Facilities.

- Food outlets have operated autonomously and have tried to market their products to a shrinking and more sophisticated customer/patron base without measurable success.

- Many operations compete for available resources while producing the same or similar products.

- There is no centrally developed or managed financial and operational standards covering all food and hospitality operations.

- There is a need to develop food and beverage programs on installation/regions that minimize duplication of products and services and have a level of standardized quality and profitability.

RECOMMENDATION

Recommend MR develop an Installation Food and Hospitality Director position to manage all food and beverage outlets on a regional or base-wide program. This position will manage all food and beverage programs and be empowered to close, consolidate or expand operations.

Position would be initially put into place in two CONUS areas. One east coast and one west coast. Salaries for the first year will be funded by MR.

SAMPLE

DIRECTIONS # 9
STANDARD LETTER

There are specific requirements in the preparation of Standard Letters. It is unlikely that you will have to prepare the final draft, as the administrative support staff within MCCS or the base administration office should have the expertise to assist in its preparation.

Standard Letters are sent only from Command to Command. In a few instances a Standard Letter may be sent by the Command to a private business contractor that is familiar with the format of such letters, such as defense contractors.

Your MCCS AC/S, Director may have "By Direction" authority to sign on behalf of the base CO when the letter pertains to matters of MCCS.

Standard Letters are also tightly controlled by the Standard Subject Identification Code (SSIC) number, the originator's code number and a serial number designating precisely the letter's number in the calendar year.

The timeliness of your correspondence, the quality of your writing and the message you are presenting are important. Equally important to your success as an MCCS manager is proper and correct communication--the Marine Corps way. Remember to call on your resources in MCCS and base administration for the support necessary to send out a Standard Letter.

Specific instructions on preparation of a Standard Letter:

Standard Letters will always be typed on Command letterhead.

"From:" and "To:" lines will indicate the title of activity head, name of activity and location or code when needed

"Via:" is numbered only when there is more than one "via" addressee. The same information is provided in the "Via:" line as for the "From:" and "To:" lines.

"Subj:" is typed in normal word order with all letters typed uppercase.

References present earlier communication that bears directly on the subject. References are presented by lower case (a), (b) and so on in parentheses.

Enclosures provide material(s) that bear directly on the subject. A single enclosure is numbered (1) in parentheses. The pattern is followed for additional enclosures. A notation is added if a particular enclosure is to be sent separately from the letter: (sep cover).

If the letter is more than one page each successive page is numbered beginning with "2". The information presented under "IN REPLY REFER TO:" on the first page is also repeated as is the subject.

There is no closing in the Standard Letter, only a signature line typed in uppercase. The "by direction" authority line is typed beneath the signer's name whenever appropriate.

Use the short title of information addressee, as found in the Marine Corps Distribution List (MCDL), when sending a "copy to" another command.

EXAMPLE # 9
STANDARD LETTER

DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3044 CATLIN AVENUE
QUANTICO, VIRGINIA 22134-5099

1710
MRC
22 Jul XX

From: Personal and Family Readiness Division
To: MCCS Director, HQBN, HQMC, Henderson Hall, 1555 Southgate Road, Arlington, VA 22214-5000

Subj: MCCS MANAGERS' COURSE

Encl: (1) Classroom Layout
(2) Course Logistic Information

1. The subject course will, with your approval, be taught at your Command during the period 11-15 October FYXX. This four day course deals with the tasks most frequently performed by MCCS managers. It consists of 13 core modules, 12 major duties and 92 tasks. The course covers tasks performed by MCCS managers such as preparing budgets, analyzing financial data, managing facilities and staff, using official instructions/policy, designing activities, events and program calendars, assessing customer needs, etc. Each student is expected to complete all 13 core modules.

2. It is designed for the following personnel:

a. Individuals who manage/supervise Cat A, B and C Programs and those who manage/supervise support/business functions

b. Senior MCCS Managers who supervise Program or support managers

c. Other MCCS manager/supervisor positions within the MCCS umbrella

d. Persons who are being groomed for any of the above positions

3. If approval is granted to conduct the course, please assign a liaison officer to work directly with us who can do the following things:

a. Obtain classroom and training aids as follows:

(1) Classroom with working table space and chair for each attendee [See enclosure (1)].

SAMPLE

EXAMPLE # 9 (page 2)
STANDARD LETTER

Subj: MCCS MANAGERS' COURSE

(2) Two flip chart easels with paper.

(3) Tables with chair for course manager and table for resources supplies, and amenities.

b. Arrange adequate lodging for personnel traveling on authorized TAD orders. If on-base facilities are unavailable, please arrange suitable off-base lodging. Please send us billeting information on enclosure (2) prior to 17 August FYXX.

4. Because the MCCS Managers' course is considered to be a "locally owned" course, the local training coordinator is responsible for logistical support Enclosure (2) and participant selection. Training coordinators from other activities should contact the local training coordinator to determine seat availability.

5. The course manager is Ms. Janet Jaeger at DSN 378-0407, Commercial (703) 432-0407 or Fax DSN 378-0402, Commercial (703) 784-0402. Thank you for your assistance and support of our training.

Grant Stewart
GRANT STEWART
By direction

Copy to:
MCCS Director
HQ, HRO

SAMPLE

2

DIRECTIONS # 10
MESSAGE

Italicized and bold items represent information either pre-set by the MTF Editor software or entered by the message preparer.

Plain type items represent information you provide to the message preparer.

1. ***Header lines B indicates the Communication Centers sending and receiving the message.***

2. ***Date time group (DTG). "P" - Priority, or "R" - Routine. (Indicates the message precedence).***

3. From/To/Info lines followed by office code.

4. ***BT - indicates a break and ends the previous section.***

5. ***Classification of message with the Standard Subject Identification Code (SSIC). Refer to SECNAVINST 5210.11 (series), Standard Subject Identification Codes, for the code appropriate to your message subject.***

6. ***Message identification information.***

7. Subject of message (SUBJ).

8. References (REF) list a single reference, or as many as necessary and relevant to your message. Abbreviations for references include LTR - letter, DOC - document, TEL - phone conversation, RMG - record message (Navy Message), MTG - meeting, etc. Check with your message preparer/typist for additional reference codes.

9. AMPN - amplifying comments required when citing only one reference.
   NARR - narrative required when citing more than one reference.

10. Point of Contact (POC) - indicate name/rank/command/code/phone and fax numbers.

11. Remarks (RMKS) - the body of the message.

12. ***BT - indicates break and ends previous section.***

13. ***Pre-set entry refers to Communication Center.***

14. ***Pre-set entry indicates message complete.***

EXAMPLE # 10
MESSAGE

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              UUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUU
                     U N C L A S S I F I E D
              UUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUUU

PTTUZYUW RUCCBWF6717 0831800-UUUU--RHMCSUU.
ZNR UUUUU
P 241800Z MAR XX ZYB
FM HQMC WASHINGTON DC//
TO COMCABWEST//
COMCABEAST//
INFO CG MCB CAMPEND//
CG MCB BUTLER//
CG MCAGCG//
CG MCB HAWAII//
CO MCAS IWAKUNI//
BT
UNCLAS
SUBJ/TRAVEL CLEARANCE REQUEST//
REF/A/DOC/CMC WASHINGTON DC/890505/X
POC/I. M. MOTIVATOR/CAPT USMC/TEL:DSN 224-2222/TEL:COM 202-874-
6717/TEL:FAX DSN 224-6847/TEL:FAX COM 202-874-6847//
RMKS/1.  TRAVEL CLEARANCE REQUESTED IAW REF A FOR FOLLOWING
HQMC (CONTRACTOR) MS MARGARET BROWN, NF-04, SSN 123-45-6789,
CLEARANCE N/A, PASSPORT NO. 123456789, ISSUED 01OCTXX, EXPIRES
30SEPXX.
2.  ITINERARY AS FOLLOWS:  MS ANTHONY WILL BE ARRIVING MCB
BUTLER 1050 WEDNESDAY 01APRXX ON UNITED FLT 938, DEPARTING 1530
SUNDAY 05APRXX TO ARRIVE MCAS IWAKUNI 1736 DEPARTING 0645
TUESDAY 07APRXX.  SHE WILL RTN ON TWA FLT B41 ARRIVING SAN
DIEGO AT 1055.
3.  TO CONDUCT FRONT END ANALYSIS OF CUSTOMER SERVICE NEEDS.
4.  NO FORN CONTACTS.
5.  OUSDP APPROVAL NOT REQUIRED
6.  CONCURRENCE IN VISIT ASSUMED UNODIR.
//
BT
#6717




NNNN
```

SAMPLE

NAVY/
MARINE CORPS
WRITING
GUIDELINES

NAVY/MARINE CORPS WRITING GUIDELINES

NOTE: Navy writing is changing. This writing guide will assist you with meeting writing standards for the Navy and Marine Corps.

A workbook called Better Navy Writing is stocked at the Naval Inventory Control Point, COG "I" Material, Philadelphia, PA.

Use the workbook as a companion to this guide to help improve your writing.

THE NEED TO IMPROVE

The sentence below appears in a directive whose grammar, spelling, and format are error free. But though the writing is perfectly correct, it is perfectly awful. Wordy and pompous, the sentence has misrepresented the disciplined officer who wrote it, misused the modern word processor that typed it, and mistreated the many readers who aren't allowed to throw it away.

- *It is the policy of the base commander that all activities on the base shall be carried out in a manner that will ensure the protection and enhancement of the environment through the control and abatement of environmental pollution.*

We might dismiss the sentence if it were an exception. It isn't. Much Marine Corps writing is similarly bloated.

To improve we must overcome the most stubborn of all obstacles: **Habit**. Perhaps because writing is so personal and painful, many of us stick to a few old patterns, even inefficient ones.

THE NEED TO IMPROVE (cont.)

Improvement requires effort by writers and encouragement from reviewers. First, though, they need to agree on what makes good Marine Corps writing. This chapter can help. What ever your role. If you are a writer, start using its principles. If you are a reviewer, let your staff know that you welcome modern writing:

- Have your writers read this chapter periodically.
- Use performance evaluations to reward writers who follow this guide.
- Make this guide part of writing improvement courses for reviewers as well as writers.
- Encourage modern writing in a memorandum to the staff or in the letter that explains your philosophy.
- Stress clear writing, not just grammatical correctness.

ORGANIZED WRITING

AVOID MYSTERY STORIES

First references, then discussion, finally so-what. Main point follows a sign such as *therefore*, *consequently*, or *due to the above*.

Writing should follow the newspaper pattern. Open with the most important information and taper off to the least important **Avoid mere chronology.**

START FAST, EXPLAIN AS NECESSARY, THEN STOP

The strongest letter highlights the main point in a one-sentence paragraph at the very beginning. Put requests before justifications, answers before explanations, conclusions before discussions, summaries before details, and the general before the specific.

Endorsements usually start by concurring or nonconcurring, while biographies usually start by giving the senior official's present duties.

You may have key points. In these cases, start with a general statement of purpose, much as directives do.

Example 1

An earlier version of the following inspection report buried the information of greatest interest to readers--the results--on the second page. It opened with references, the inspection's scope, and detailed findings. By the way, inspection reports and other documents whose topics vary widely are especially suited to headings. They allow readers to see the structure at a glance. A better start would have been:

- The Recreation Department was inspected on 24 January 1998. Its overall performance was satisfactory. Special interest areas were satisfactory.

START FAST, EXPLAIN AS NECESSARY, THEN STOP (cont.)

Example 2

A lesser writer might have combined the two paragraphs below. Worse, he or she might have started with the second paragraph and delayed the request for authorization until the bitter end. Remember to keep your first paragraphs short, to use one-sentence paragraphs occasionally for special emphasis, and to avoid more chronology.

- We request authorization to hire a full-time clerk typist or reassign an admin clerk from the word-processing center.

- In January 20XX, our word-processing workload increased because of . . .

Example 3

The memorandum below developed a series of complex points that would have come too fast if they had appeared in the top paragraph, so the writer wisely began with a general statement of purpose. Should he or she have begun, "The purpose of this memorandum is to summarize . . ."? Strictly speaking, the added words are unnecessary, but they leave no doubt that a key idea is about to follow.

- This memorandum summarizes how we are planning the first step toward your goal of reorganizing the Recreation department.

Delay your main point to soften bad news, for example, or to introduce a controversial proposal. But don't delay routinely. In most cases, plunge right in.

To end most letters, just stop. When writing to persuade rather than just to inform, you may want to end strongly with a forecast, appeal, or implication.

DOWNPLAY REFERENCES

Reading letters that overuse references is like driving in reverse through alphabet soup. Many letters need no references at all, while others are complete with a reference to only the latest communication in a series. **Avoid unnecessary or complicated references.**

Don't waste the opening, the strongest place in a letter, by merely summarizing a reference or saying you received or reviewed something:

Example

- Reference (a), inter alia, recommended the reestablishment of training in the field of transportation management. Reinstatement of this training is strongly supported.

- We strongly support the recommendation in reference (a) to reestablish transportation management training.

USE SHORT PARAGRAPHS

Cover one topic completely before starting another, keep paragraphs short, down to roughly four or five sentences. By adding white space, you make reading easier.

- Short paragraphs are especially important at the start of letters.

- Call attention to lists of items or instructions by displaying them in subparagraphs.

- Now and then use a one-sentence paragraph to highlight an important idea.

TAKE ADVANTAGE OF TOPIC SENTENCES

A paragraph may need a topic sentence. The topic sentence of a paragraph is like the main point of a letter; both give general statements that are developed later. The decision to use a topic sentence is among a writer's many judgment calls.

A short paragraph announcing the time, place, and agenda of a meeting might begin with, "Here are details about the meeting." Such a topic sentence is unnecessary, for readers can follow the writers thinking without it.

However, a short and simple letter that could be written as one unbroken paragraph should still be divided for ease of reading.

WRITE DISCIPLINED SENTENCES

A few important ways to avoid sentences that mumble:

- Subordinate minor ideas.
- Place ideas deliberately.
- Use more parallelism.
- Try some mini-sentences.

SUBORDINATE MINOR IDEAS

The revised differential pay tables, which have been mailed to all pay offices, are effective 1 October. (Stresses date.)

The revised differential pay tables, which are effective 1 October, have been mailed to all pay offices. (Stresses mailing.)

PLACE IDEAS DELIBERATELY

We may have to replace the rental boats *faster* if more major structural problems arise. (Faster replacement muted.)

If more major structural problems arise, we may have to replace the rental boats *faster*. (Faster replacement stressed.)

USE MORE PARALLELISM

Their position is that the workshop is a forum for the dissemination of information and is not intended to establish standards.

Their position is that the workshop is a forum for *sharing* information and not for *setting* standards.

TRY SOME MINI-SENTENCES

An occasional sentence of six words or less slows down readers and emphasizes ideas. The principle is illustrated in this next example from a general's memo to his staff:

- I can get more information if each of you gives me less. Here's why. In a week, about 110 staff actions show up in my in-box. I could handle that in a week if all I did was work the in-box. Yet 70 percent of my time in the headquarters goes not to the in-box but to briefings. I could handle that dilemma, too--by listening to briefings and thinking about staff papers at the same time. I don't.

NATURAL WRITING SPEAK ON PAPER

Make your writing as formal or informal as the situation requires, but do so with language you might use in speaking.

A spoken style means fewer gears to shift each time we write. It also means less adjustment for new personnel, who find the old style increasingly foreign. You probably remember your own difficulty in getting used to roundabout writing.

Make your writing more like speaking, imagine your reader is sitting across from your desk, writing to many different people, picture one typical reader. Then write with personal pronouns, everyday words, and short sentences.

USE PERSONAL PRONOUNS

Speak of your program, command, or office as *we, us, our*. Use *you*, stated or implied, to refer to the reader.

Use *I, me, my* less often, usually in correspondence signed by the commanding officer and then only to show special concern or warmth.

Ordinary English is shorter, clearer, and just as official.

Incorrect: It is necessary that the material be received in this office by 10 June.

Correct: We need the material by 10 June.

OR

The material must reach us by 10 June.

RELY ON EVERYDAY WORDS

Don't use big words when little ones will do. People who speak with small words often let needlessly fancy words burden their writing. On paper, help swells to assistance, pay to remuneration, and visit to visitation.

Here are some commonly overdressed words:

REPLACE	WITH
commence	start
facilitate	help
optimum	best
promulgate	issue
utilize	use

Prefer short, spoken transitions over long, bookish ones. Save long transitions for variety. You can start sentences with conjunctions such as but, so, yet, and.

REPLACE	WITH
consequently	so
however	but
in addition	also
nevertheless	still

RELY ON EVERYDAY WORDS (cont.)

Avoid the needless complications of legalistic lingo. Let a letter's signature carry the authority. Size of vocabulary is less important than skill in manipulating the words you already know. Write to **ex**press not to **im**press.

REPLACE	WITH
aforesaid	the, that
heretofore	until now
herewith is	here is
notwithstanding	in spite of
the undersigned	I
pursuant	under

USE SOME CONTRACTIONS

Contractions link pronouns with verbs (*we'd, I'll, you're*) and make verbs negative (*don't, can't, won't*). They are appropriate in less formal writing situations. Use contractions in drafts to help you write naturally. Readers are less likely to skip over not when it is contracted.

If contractions seem out of place, you may need to deflate the rest of what you say. In the next sentence, something has to go, either the opening contraction or the inflated language that follows: "It's incumbent upon all personnel to effect energy savings." Written naturally, the sentence might read, "It's your job to save energy."

KEEP SENTENCES SHORT

Mix long sentences and short ones, average under 20 words. Try the eye test: Average under two lines. Or try the ear test: Read your writing aloud and break up most of the sentences that don't end in one breath.

Break long sentences into manageable units. Then prune needless words and ideas:

- It is requested that attendees be divided between the two briefing times with the understanding that any necessary final adjustments will be made by MCCS personnel to facilitate equitable distribution. (30 words.)

- It is requested that attendees be divided between the two briefing times. Any necessary final adjustments will be made by MCCS personnel to facilitate equitable distribution. (12, 14 words.)

- Send half your people at one time and half at the other. MCCS personnel will make final adjustments. (12, 6 words.)

ASK MORE QUESTIONS

A request gains emphasis when it ends with a question mark.

BE CONCRETE

We sum up vast amounts of experience when we speak of dedication, programs, hardware, and lines of authority. But such broad language isn't likely to evoke in a reader's mind the same experiences it evokes in a writer's. Lazy writing overuses such vague terms.

If you write, "The solution to low morale and poor discipline is good leadership," your readers may feel warm all over. But until you point out some specific behavior meant by **low morale, poor discipline, and good leadership,** neither you nor your readers can tackle the problem.

Don't use a general word if the context allows for a specific one. Be as definite as the situation permits.

REPLACE	WITH
function	lunch, dinner
automobile	car
improved costs	lower costs
enhanced method	faster method? cheaper?

Vague, high-sounding language weakens your writing.

LISTEN TO YOUR TONE

Tone--a writer's attitude toward the subject or readers--causes relatively few problems in routine letters. The rules are straightforward. Subordinates may suggest, request, or recommend, but only superiors may direct.

The more sensitive the reader or issue, the more careful we must be to promote good will. Tactlessness in writing suggests clumsiness in general. When feelings are involved, one misused word can make an enemy.

Beware of rubber-stamp endings. They don't improve good letters or save bad ones. To the reader whose request has been denied, **further assistance** promises further disappointment. The closing sentence should be dropped entirely or tied to the rest of the letter:

- This setback aside, we hope you will take advantage of other correspondence courses available to you.

Most no answers need some explanation. **YES** answers need little explanation because readers get what they want.

COMPACT WRITING CUT THE FAT

Give your ideas no more words than they deserve. Economy requires the right attitude. Suspect wordiness in everything you write. When you revise, tighten paragraphs to sentences, sentences to clauses, clauses to phrases, phrases to words, words to pictures, or strike the idea entirely.

AVOID "IT IS" AND "THERE IS"

Unless **it** refers to something mentioned earlier, avoid **it is**. Spare only natural expressions such as "it is time to . . . " or "it is hard to . . ."

REPLACE	WITH
it is requested	we request, please
it is my intention	I intend
it is necessary that you	you need to, you must
it is apparent that	clearly
it is the recommendation of this office	we recommend that

PRUNE WORDY EXPRESSIONS

In order to and in accordance with, for example, are minor ideas that don't deserve three words. Here are some repeat offenders.

REPLACE	WITH
for the purpose of	for, to
in accordance with	by, following, per, under
in order to	to
in the event that	if
in the near future	soon
in the process of	during

FREE SMOTHERED VERBS

The most important word in a sentence is the verb. When you write a general verb such as make or is, check to see if you can turn a nearby word into a verb. Let your verbs do more work.

Example: This directive is applicable to all personnel who make use of the system.

This directive applies to all personnel who use the system.

Example: We will conduct an investigation into the matter before making a decision.

We will investigate the matter before making a decision.

SPLICE DOUBLINGS

As the writer you may see some differences between advise and assist, interest and concern, or thanks and gratitude. But your readers won't.

Simple subtraction will overcome doublings such as these:

- Headquarters Marine Corps has developed plans for an orderly and integrated system of executive and management advancement.

- Headquarters Marine Corps has developed plans for a system of executive advancement.

SHUN THE "-ION" AND "-MENT"

Words ending in -ion and -ment are verbs turned into nouns. Whenever the context permits, change these words to verb forms.

Example: Use that format for the preparation of your budget summary.

Use that format to prepare your budget summary.

Example: The development of an effective system depends on three factors.

Developing an effective system depends on three factors.

(OR)

An effective system depends on three factors.

AVOID EXCESSIVE ABBREVIATING

Excessive abbreviating is false economy. Use abbreviations no more than you must with insiders and avoid them entirely with outsiders.

ACTIVE WRITING

AVOID DEAD VERBS

They make writing wordy, roundabout, and sometimes confusing. Spot passive verbs and make them active:

Doctor: When did you first notice your use of verbs in the passive voice?

Patient: The utilization was first noticed by me shortly after the Navy was entered. The Marine Corps has been joined by my brother. The same condition has been remarked on by him.

Doctor: Did you know that most of the verbs we speak with are active? So are most of the verbs in newspapers and magazines, the kinds of writing we like to read.

Patient: Well, it is believed by me that most verbs are made passive by Marine Corps writers. In the letters and directives that have been prepared by this speaker, passive verbs have been utilized extensively. Are problems caused?

Doctor: Yes, problems are caused. Or, rather, passives cause problems.

Most of your sentences should use a **who-does-what** order. By leading with the doer, you automatically will avoid a passive verb:

Passive: The bowling center was inspected by the MCCS AC/S, Director.

Active: The MCCS AC/S, Director inspected the bowling center.

LEARN THE SYMPTOMS OF PASSIVE VOICE

A verb in the passive voice uses any form of to be plus the past participle of a main verb:

am, is, are, was, were, be, being, been

PLUS

A main verb usually ending in -en or -ed.

Unlike sentences with active verbs, sentences with passives don't need to show who or what has done the verb's action.

KNOW THE THREE CURES

Put A Doer Before The Verb:

- The requests will be approved. (By whom?)
- (Supervisor?) will approve the requests.

Drop Part of The Verb:

- The results are listed in enclosure (2).
- The results are in enclosure (2).

Change the Verb:

- Letter formats are shown in this manual.
- Letter formats appear in this manual.

WRITE PASSIVELY ONLY FOR GOOD REASON

Write passively if you have good reason to avoid saying who or what has done the verb's action. This situation may occur when the doer is unknown, unimportant, obvious, or better left unsaid. When in doubt, write actively.

MCCS MANAGERS' DESK REFERENCE
DUTY 9.0 - OVERSEE ADMINISTRATION

TASK 9.3

Develop Internal Policies/Procedures (SOPs)

DO THIS TASK WHEN

- The MCCS Director directs you to write or revise a standard operating procedure (SOP).
- A higher headquarters publishes a new/revised policy or procedure that affects your Program.
- Your station Commanding Officer publishes a new or revised policy or procedure that affects your Program.
- Another federal agency publishes a new/revised policy or procedure that affects your Program.
- MCCS manager, supervisor, staff member or customer/ patron identifies a need to clarify/revise an existing policy or procedure.
- You have Program-specific procedures that need to be standardized and used by your staff.
- Annual review of your SOPs is due.

REFERENCES

- SECNAVINST 5210.11 (series), Department of the Navy File Maintenance and Standard Subject Identification Codes.
- SECNAVINST 5215.1 (series), Department of the Navy Directives Issuance System.
- All required/recommended directives, instructions and notices relative to your Program. (See Task 9.4, Locate, Maintain, Interpret, and Apply Official Policies and Instructions.)
- All directives, instructions and notices relative to "general/overall" MCCS operations.
- Navy MWR Training Branch (PERS-654) handout on Standards of Conduct and Government Ethics.

SUPPLIES/ RESOURCES

- Computer with word processing software.
- **www.dodssp.daps.mil** to order all directives and instructions that are stocked by the Defense Supply Center, Philadelphia, PA. (This Internet address is NOT case sensitive.)
- **www.usmc.mil** to see and copy/download Marine Corps Orders, and SECNAV instructions, and DoD directives.
- Higher headquarters instructions.
- Existing SOPs, if any.
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Policies, practices, and methods are published that:

  - Are accurate and effective.
  - Are clear and easy to understand.
  - Are prepared using a locally determined standardized format.
  - Are written using correct grammar and short, concise, specific and complete sentences.
  - Are written at an easy reading level.
  - Are logically organized.
  - Deal with a single subject while completely covering the subject. Nothing is assumed or left to interpretation.
  - Are free of spelling and typographical errors.
  - Contain current and correct fees, prices, and charges, if applicable.
  - Define authorized users, if applicable.
  - List current and correct hours/days of operation.
  - Include correct operating instructions, procedures and sequences, if applicable.
  - Contain current and correct safety instructions, precautions and warning, if applicable.
  - Spell out appropriate and effective internal controls, if applicable.
  - Use a standardized numbering system determined by the MCCS Director or local policy.

- You have prepared and distributed SOPs to minimize risk of injury, accident, illness, property damage and losses.

- You have prepared and distributed SOPs that detail and standardize daily/routine operating procedures. (See list of topics for SOPs on page 9.3.17.)

NOTES

SOPs provide MCCS staff and customers/patrons with policies, procedures, and regulations about the MCCS facilities, operations, safety, security, fees/prices/charges, accountability, procurement, shipping/receiving, inventory requirements, etc.

All managers, supervisors and staff members should routinely review and, when applicable, recommend changes to the SOPs affecting their area(s) of responsibility.

Failure to prepare Program-specific, effective, clear, easy to understand and easy to apply policies, procedures, or SOPs may result in the following:

- Accidents/injury.
- Circumvention of the intent of the policy, or procedure.
- Customer/patron dissatisfaction.
- Difficulty of providing or obtaining feedback.
- Equipment damage/loss.
- Failure of staff to comply.
- Financial instability or collapse.
- Fraudulent operations/practices.
- Grievances.
- Illegal/inappropriate/unauthorized personnel actions.
- Illegal/inappropriate/unauthorized business operations/ practices.
- Inability of management to assess staff performance.
- Inconsistent performance.
- Lack of accountability.
- Lack of consistency within/among programs.
- Litigation.
- Loss of credibility.
- Poor communication within/among programs.
- Staff member confusion.
- Theft/misappropriation.

NOTES (cont.)

The goal for your SOPs should include the following:

- Simplify complicated procedures.
- Standardize performance among your staff members who perform the same procedures.
- Improve performance--reduce errors, variances, omissions.
- Provide your Program's activities, events, products, and services safely and securely.
- Minimize risk to your staff and your customers/patrons.
- Reduce costs/losses.
- Maximize your resources.

SOPs provide a way for you to store complicated procedures that your staff members can readily refer to and apply when appropriate. It is infinitely easier to "store" procedural details on paper, signs, placards, and/or computers, than in your staff's heads.

People forget, transfer, get promoted, retire, quit, don't feel well, etc. Plus, once a person learns a procedure, it is more difficult and more costly to change what he has memorized and practiced than to change an SOP. (See Task 6.5, Train/Develop Staff and Task 4.3, Solve Performance Problems.)

PROCEDURE

Step 1 Review the "Do This Task When" list on Page 9.3.1 of this task to determine if you need to develop or revise a SOP.

☐ If any of the "Do This When" cues exist, continue with Step 2.

Step 2 Determine the appropriate action to take.

IF:	THEN:
You have an SOP that meets the standards below for the current "Do This Task When" cue.	**STOP HERE.**
You have an existing SOP that does **NOT** meet the standards below.	Go to Step 3.
You do NOT have an SOP for the current "Do This Task When" cue.	Go to Step 9.

SOP STANDARDS
☐ Accurate and effective. ☐ Clear and easy to understand. ☐ Prepared using a locally determined standardized format. ☐ Written using correct grammar and short, concise, specific and complete sentences. ☐ Written at an easy reading level. ☐ Logically organized. ☐ Deals with a single subject while completely covering the subject. Nothing is assumed or left to interpretation. ☐ Free of spelling and typographical errors. ☐ Contains current and correct fees, prices, and charges, if applicable. ☐ Defines authorized users, if applicable. ☐ Lists current and correct hours/days of operation. ☐ Includes correct operating instructions, procedures and sequences, if applicable. ☐ Contains current and correct safety instructions, precautions and warning, if applicable. ☐ Spells out appropriate and effective internal controls, if applicable. ☐ Uses a standardized numbering system determined by the MCCS Director or local policy.

TO REVISE EXISTING SOP

Step 3 Determine need to revise existing SOP.

☐ Check to ensure the existing SOP meets all applicable standards listed in the table in Step 2.

IF:	THEN:
Applicable standards/conditions are met.	1. **STOP HERE.** 2. No further action required.
Applicable standards/conditions are **NOT** met.	1. Continue with Step 4.

Step 4 Determine if revision or rewrite is needed for this SOP.

IF:	THEN:
Changes are minimal.	A revision is probably necessary. 1. Make changes as needed in draft form. 2. Continue with Step 5.
Changes are significant.	A complete rewrite is probably necessary. 1. Rewrite in draft form. 2. Go to Step 9.

NOTE:	You will need to decide whether a few items can be changed to make the SOP okay, or will it take longer to edit than it will to start over?

Step 5 Check revised SOP for the following.

SOP REVIEW CHECK LIST:

- ☐ Compares correctly and completely to the appropriate:
  - Existing higher headquarters instruction/directive.
  - Existing local instruction/directive.
- ☐ Is technically correct, legal and authorized.
- ☐ Accurate and effective.
- ☐ Accomplishes desired purpose/attains desired results.
- ☐ Contains current and correct fees, prices, and charges, if applicable.
- ☐ Defines authorized users, if applicable.
- ☐ Lists current and correct hours/days of operation, if applicable.
- ☐ Includes correct operating instructions, procedures and sequences, if applicable.
- ☐ Contains current and correct safety instructions, precautions and warning, if applicable.
- ☐ Spells-out appropriate and effective internal controls, if applicable.
- ☐ Does NOT contradict other official instructions or directives or federal/state statutes.
- ☐ Remains within the MCCS Director's area of authority and responsibility as defined and authorized by the Commanding Officer.
- ☐ References CG's/CO's (base) instruction(s), if applicable.
- ☐ Is prepared using a locally specified format. (See examples at the end of this Task.)
- ☐ Is clear and easy to understand.
- ☐ Written using correct grammar and short, concise, specific and complete sentences.
- ☐ Written at an easy reading level.
- ☐ Logically organized.
- ☐ Deals with a single subject while completely covering the subject. Nothing is assumed or left to interpretation.
- ☐ Is free of spelling and typographical errors.
- ☐ Has appropriate locally assigned SOP system number or Standard Subject Identification Code (SSIC).
- ☐ Indicates distribution.
- ☐ Explains instructions for posting in the work area if appropriate.

Step 6 If in doubt about content, legality or appropriateness, forward your proposed SOP to the appropriate official, for review, using local procedures and chain of command:

- ☐ MCCS Director/Director/AC/S.
- ☐ MCCS Finance Office.
- ☐ Immediate supervisor.
- ☐ MCCS Administrative Officer.
- ☐ Judge Advocate General (JAG) Office (legal services).
- ☐ Station Equal Employment Opportunity (EEO) office.
- ☐ Internal Review.
- ☐ Human Resources Office.
- ☐ Comptroller.
- ☐ General Safety Officer.
- ☐ Security Officer.
- ☐ Preventive Medicine.
- ☐ Base/Maintenance Officer.
- ☐ Public Works Officer.
- ☐ Public Affairs Officer.
- ☐ Supply Officer.
- ☐ Base Commanding General/Station Commanding Officer.
- ☐ Other applicable MCCS Program office.
- ☐ Other appropriate official.

NOTE:	Depending on your local policies, this step may have to be done by the MCCS Director. Check with your immediate supervisor prior to sending the SOP to anyone outside your MCCS Program.

Step 7 Always test your revised SOPs with typical users.

NOTE:	The purpose of the test is to ensure the intended performer can follow the guidance in the SOP. For some of your SOPs you will be able to observe an inexperienced performer complete the task in accordance with the SOP. In other cases you will need to have the inexperienced performer use the SOP and tell you what he/she would and would NOT do, how well, when, why, where, and how, especially when the SOP guides the performer's decisions and behaviors, or details conditions and/or circumstances that can not be realistically or safely demonstrated.

Step 8 Determine next processing action:

IF:	THEN:
SOP requires correction.	1. Enter your edits on the "draft". 2. Review as necessary using check list at Step 5. 3. Go to Step 17.
SOP is OK.	Continue with Step 17.

PREPARE NEW OR COMPLETELY REWRITE SOPs

Step 9 Gather and review all official directives, publications, and information pertaining to the subject/focus/purpose of the proposed SOP.

- ☐ Ensure you have current revisions of the directive, publication, or reference material.
- ☐ Use all pertinent instructions.

Step 10 Gather all existing SOPs that are related to the functions/actions for which you will be drafting a new SOP.

Consider the following sources:

- ☐ Your MCCS Managers' Desk Reference.
- ☐ Other MCCS training materials/desk references.
- ☐ Your colleagues/peers and MCCS Program managers at other bases.
- ☐ MCCS Program and the Base Admin Offices.
- ☐ Your professional network and professional organizations/ associations.
- ☐ Check subject on the Internet and the World Wide Web (WWW).

(See Task 9.4, Locate, Maintain, Interpret, and Apply Official Policies and Instructions.)

Step 11 Prepare a "draft" SOP.

Ensure the draft:

- ☐ Compares correctly and completely to the appropriate:
  - Existing higher headquarters instruction/directive.
  - Existing local instruction/directive.
- ☐ Is technically correct, legal and authorized.
- ☐ Accurate and effective.
- ☐ Accomplishes desired purpose/attains desired results.
- ☐ Contains current and correct fees, prices, and charges, if applicable.
- ☐ Defines authorized users, if applicable.
- ☐ Lists current and correct hours/days of operation, if applicable.
- ☐ Includes correct operating instructions, procedures and sequences, if applicable.
- ☐ Contains current and correct safety instructions, precautions and warning, if applicable.
- ☐ Spells-out appropriate and effective internal controls, if applicable.
- ☐ Does NOT contradict other official instructions or directives or federal/state statutes.
- ☐ Remains within the MCCS Director's area of authority and responsibility as defined by the Commanding Officer.
- ☐ References CG's/CO's (base) instruction(s), if applicable.
- ☐ Is prepared using a locally specified format. (See examples at the end of this Task.)
- ☐ Is clear and easy to understand.
- ☐ Written using correct grammar and short, concise, specific and complete sentences.
- ☐ Written at an easy reading level.
- ☐ Logically organized.
- ☐ Deals with a single subject while completely covering the subject. Nothing is assumed or left to interpretation.
- ☐ Is free of spelling and typographical errors.
- ☐ Has appropriate locally assigned SOP system number or Standard Subject Identification Code (SSIC).
- ☐ Indicates distribution.
- ☐ Explains instructions for posting in the work area if appropriate.

Step 12 If in doubt about content, legality or appropriateness, forward your proposed SOP to the appropriate official, for review, using local procedures and chain of command:

- ☐ MCCS Director/Deputy, AC/S.
- ☐ MCCS Finance Office.
- ☐ Immediate supervisor.
- ☐ MCCS Administrative Officer.
- ☐ Judge Advocate General (JAG) Office (legal services).
- ☐ Station Equal Employment Opportunity (EEO) office.
- ☐ Internal Review.
- ☐ Human Resources Office.
- ☐ Comptroller.
- ☐ General Safety Officer.
- ☐ Security Officer.
- ☐ Preventive Medicine.
- ☐ Base/Maintenance Officer.
- ☐ Public Works Officer.
- ☐ Public Affairs Officer.
- ☐ Supply Officer.
- ☐ Base Command General/Station Commanding Officer.
- ☐ Other applicable MCCS Program office.
- ☐ Other appropriate official.

NOTE:	Depending on your local policies, this step may have to be done by the MCCS Director. Check with your immediate supervisor prior to sending the SOP to anyone outside your MCCS Program.

Step 13 Get a "Sanity check". Use one or more of the following to read or work through the SOP for accuracy and to look for missing/unworkable parts.

- Trusted colleagues/peers.
- Your staff members.
- MCCS Admin Staff.
- A customer/patron, advisory group/member, Family Member Volunteer, Sgtmaj., etc.

Step 14 Make any needed adjustments or corrections.

Step 15 Always test your revised SOPs with typical users.

NOTE:	The purpose of the test is to ensure the intended performer can follow the guidance in the SOP. For some of your SOPs you will be able to observe an inexperienced performer complete the task in accordance with the SOP. In other cases you will need to have the inexperienced performer use the SOP and tell you what he/she would and would NOT do, how well, when, why, where, and how, especially when the SOP guides the performer's decisions and behaviors, or details conditions and/or circumstances that can not be realistically or safely demonstrated.

Step 16 Make any additional adjustments or corrections, if applicable.

Step 17 Forward the corrected and smooth "draft" SOP for MCCS Director's review and approval via your chain of command.

Step 18 Determine next processing action:

IF:	THEN:
MCCS Director returns for correction.	1. Make corrections. 2. Repeat previous design, check, test, and rework Steps as applicable to the edits/changes. 3. Re-route for approval, unless original edits/corrections were minor.
MCCS Director returns approved & signed.	Continue with Step 19.

Step 19 Ensure preparation of final version of the SOP for signature using all review/revision input you received.

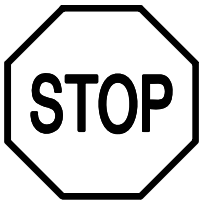
NOTE:	Preparation of the final SOP is typically an MCCS Admin and/or MCCS Finance Office responsibility. Follow local practices and procedures regarding finalizing your SOP.

Step 20 Ensure SOP is signed (approved) per local policy.

IF:	THEN:
You have signing authority for SOPs.	1. Sign and date the SOP. 2. Continue with Step 21.
MCCS Director's or Admin Officer's or other officials signature of approval is required.	1. Date the SOP. 2. Forward SOP to MCCS Director, Admin Officer, or approving official for signature. 3. Continue with Step 21.

Step 21 After the SOP is signed ensure the following actions are taken to implement the SOP.

- ☐ SOP title and effective date has been entered in the MCCS SOP numerical index per local procedures.
- ☐ SOP is reproduced and distributed to everyone who needs it.
- ☐ Staff is provided copies of SOP and briefed or trained as necessary on the new or revised SOP.
- ☐ New policy/procedure is advertised/published for your customers/ patrons as appropriate. (E.g., newsletters, flyers, posters, signs, etc.)
- ☐ Make appropriate pen & ink changes in your SOP Index.



Congratulations! You've completed this task.

~ SUGGESTED SUBJECTS ~

Consider the following subject areas when developing SOPs for your MCCS Program:

Accident Prevention
Accounting for NAF Property
Advertising, Promotions, and Marketing
Amusement Machines
Applications for Employment
Awards/Incentives Program

Budgets (input & control)

Cash Discrepancies
Cash Receipts
Change Funds an Petty Cash
Check Handling Procedures
Civilian Employees
Close Out Daily Financial Transactions
Coffee Messes
Coin Operated Machines and Harvesting
Credit and Debit Cards
Crowd Control
Customer and Staff Safety
Customer Service

Program Image/Dress Requirements
Inclement/Hazardous Weather Plan
Disaster Preparedness Plan

Environmental Control
Equipment Dispositioning
Establishing Activities Hours of Operation

Food Service Sanitation Inspections & Preventive Medicine Reports

Hazardous Materials (HAZMAT)

Inventory Requirements & Procedures

Leave for NAF Employees

Maintenance of Facilities and Equipment
Money Escorts
MCCS Grounds Maintenance

NAF Incentive Awards Program
NAF Personnel Grievances and Appeals
Night Depository Safe

Payroll Procedures
Physical Security
Purchasing Procedures

Recycling Program
Refund Policies
Rental Locker Procedures

Safe Combinations
Shipping and Receiving
Special Order/Lay-Away Merchandise
Sponsorship
Standard Operating Procedures (SOPs)
SOP Distribution List

Tickets
Training
Travel, Travel Orders and Travel Claims

Use of MCCS Facilities/Activities (e.g., scheduling, who can use, use by civilians, use by drilling reservists, etc.)
Use of Personal Vehicles for Government Work

Vehicle Fueling & Servicing Policies

Work Related Injuries
Work Requests (PWC/In-House Maintenance)

Zone Inspections

Etc. (Including MCCS Program-specific SOPs.)

PARTIAL LIST OF SUBJECTS FOR SOP's
CONSIDER THE FOLLOWING PROGRAM AREAS WHEN DEVELOPING AN SOP SYSTEM:
Arts & Crafts Hobby Shop Auto Hobby Shop Bingo Operations BOQ Beverage/Food Service Bowling Center Car Wash Catering Child Development Center Consolidated Clubs Family Home Care Fitness Center Golf Course Information, Tickets & Tours (ITT) Lakes and Picnic Areas Library Marina Outdoor Recreation Pistol/Rifle Ranges Recreation Center Recreation Equipment Check-Out Facility Slot Machine Operations Snack Bars Special Rental Equipment Special Events Sports & Fitness Center Stables Summer Day Camp Program Swimming Pools Theater Youth Activities Fitness Program Young Adult Program/Single Marine **YOUR OTHERS!**

(YOUR LETTERHEAD)

MCCS SOP Number
Code Number
Date 00 XXX 00

MCCS Semper Fit SOP 0000.0B

From: MCCS AC/S, Director.

Subj: MCCS STANDARD OPERATING PROCEDURES.

Encl: (1) Numerical Index.

1. Purpose. To provide information for publishing and maintaining the MCCS organization standard operating procedures.

2. Cancellation. MCCS SOP 0000.0A

3. Discussion. MCCS SOP's are published to establish, clarify or supplement existing regulations. Procedures or regulations contained in MCCS SOP's shall not be construed as conflicting with or modifying any directive or regulation signed by higher authority. Topics covered by these procedures will be of a permanent or recurring nature. MCCS SOP's pertaining to matters other than internal administration will be approved by the Commanding General, (Base Name), before issuance.

4. Responsibility.

a. All MCCS program managers/supervisors are responsible for maintaining an up-to-date folder of all MCCS SOP's that will be available to all staff members and customers/ patrons for reference and compliance.

b. All MCCS program managers/supervisors are responsible for ensuring that the contents of MCCS SOP's pertaining to their area are current and correct.

5. Action.

a. This MCCS SOP shall be placed in front of each MCCS SOP folder. The Numerical Index contained in enclosure (1) shall be maintained current by pen and ink annotations entered by the addressees as revisions, change transmittals, additions, or deletions are issued.

SAMPLE

Subj: MCCS STANDARD OPERATING PROCEDURES.

b. MCCS program managers/supervisors shall ensure that their respective staff members read, understand, and comply with all applicable MCCS SOP's.

c. All MCCS program managers, supervisors, and MCCS support staff will conduct review and revision of their SOP's whenever the SOP is affected by a change in policy, procedure or condition.

d. All MCCS program managers/supervisors will conduct an annual content review of all MCCS SOP's pertaining to their area of responsibility. This total MCCS SOP annual review will begin the ____ day of _____(month). Proposed changes, revisions, additions, and deletions shall be submitted via respective reviewing/approving official not later than 15 working days following the annual review date.

e. Additional copies of MCCS SOP's are available in the MCCS administrative office.

Martin C. Coleman

Martin C. Coleman
MCCS AC/S, Director

SAMPLE

Enclosure (1) Numerical Index

Distribution: IAW List 1 and List 2
Stock: 150

YOUR LETTERHEAD)

MCCS SOP Number
Code Number
Date 00 XXX 00

MCCS Semper Fit SOP 0000.0B

From: MCCS AC/S, Director

Subj: TICKETS

Ref: (a) MCCS SOP XXX, Standard Purchasing Procedure

1. Purpose. To establish a uniform procedure for the accounting and sale of tickets to special MCCS activities/ events.

2. Cancellation. MCCS SOP 0000.0A

3. Discussion. In the accomplishment of its mission, the MCCS Program frequently acts as sales agent for tickets to community activities/events. Tickets to various functions shall be controlled and issued from the ITT Office located in building _____. These special event tickets usually represent a large monetary value.

4. Action. The following procedures are established to minimize the risk of loss of tickets:

a. The Head, Semper Fit shall determine and initiate action to obtain same. He/she shall forward a purchase order work sheet to the Procurement Branch indicating the quantity, selling price, date required, and date unsold tickets and/or check is to be furnished to the vendor. In addition, he/she shall establish the time frame for sale of tickets to each event and ensure that appropriate notice of such sale is issued.

b. The Procurement Branch Head shall prepare the purchase order for the desired number of tickets in accordance with the prescribed purchasing procedures in accordance with reference (a).

c. Tickets that are picked up by an MCCS Program driver at a vendor’s place of business will be counted and signed for by the driver and delivered to the Finance Office for verification and distribution to the ITT Office.

d. Tickets delivered by the vendor's messenger or by means other that in paragraph 4c shall be verified and signed for by MCCS Finance personnel.

e. MCCS Finance personnel shall issue tickets to the Travel Center cashier and obtain a receipt.

f. The number of tickets held at the ITT Office shall be kept to a minimum (three days supply is the maximum amount).

g. Tickets shall be handled as cash. Each cashier shall obtain a receipt from his/her relief prior to being relieved at the completion of a shift. The same receipt utilized for the change fund will be used.

h. A separate Daily Activity Report (NAVCOMPT Form 738) will be prepared to cover ticket sales.

i. A cash register shall be used to record each ticket sale.

j. At the close of business unsold tickets shall be counted and stored in the safe compartment.

k. Cashiers are responsible for the correctness of the ticket count.

l. After the close of sales to an event, the ITT cashier shall deliver any unsold tickets to the MCCS Finance for closeout. MCCS Finance shall issue a receipt for all tickets turned in.

m. MCCS Finance personnel shall verify ticket sales and prepare a check for payment upon receipt of actual sales information.

n. All unsold tickets shall be returned to the vendor and a receipt obtained and appended to the purchase order.

5. Any irregularities in this procedure or deficiency in the handling of and accounting for tickets will be reported to the MCCS AC/S, Director.

Martin C. Coleman

Martin C. Coleman
MCCS AC/S, Director

Distribution: IAW List 1 and List 2
All Central Ticket Office Cashiers
Stock: 220

SAMPLE

MCCSSOP	Number
Code	Number
Date	00 XXX 00

MCB Camp Bulter Child Development Program's
Standard Operating Policy
Emergency Operations

1. REFERENCE: DoDI 6060.2

2. PURPOSE: To establish effective operational procedures for the Child Development Program for essential duty parents who are required to work due to emergencies.

3. SCOPE: This instruction applies to all Child Development Center (CDC) employees at MCB Camp Bulter.

4. POLICY: Atsugi CDC will be open to provide care for children of essential duty parents who are required to work during emergencies such as adverse weather, eminent hostilities, natural disasters, alerts and mobilizations.

5. RESPONSIBILITIES:

A. MCCS Director will notify the Child Development Program Administrator (CDPA) of the hours of operation needed and authorize overtime, if needed, for CDP staff.

B. The CDPA will ensure proper staffing for the center(s) to be open and contact the Center Directors. Supplies must be procured either through the commissary or through MCCS warehouse.

C. Center Directors will provide staff supervision as required and inform parents of the needed items for their children. Directors must be available to provide services as needed.

6. PROCEDURES:

A. A child development center will remain open and provide normal services during an emergency unless/until notified by the MCCS Director or through the military Chain of Command.

SAMPLE

B. After normal working hours, the MCCS Director will notify the CDPA of opening times for the centers or provide information to be passed along to CDP employees.

C. Staff will be called for duty with the employees living closest to the centers being called first. Employees living nearby a center in which they do not normally work will be expected to report when called to the center closest to their living quarters.

D. If there is a "No Travel" warning, only employees living at Camp Bulter will be required to work. When staff are required to bring their child(ren), there will be no charge for the care of their children.

E. Once children are in the center and conditions worsen to jeopardize the safety of the children, the child will remain in the center until conditions are improved.

F. Should only a few children require care, the CDPA will contact the FCC Director to make arrangement with FCC providers for these children. MCCS will ensure FCC providers are reimbursed.

7. Point of contact for this action is the Child Development Program Administrator at 264-6367.

SAMPLE

MCCS MANAGERS' DESK REFERENCE
DUTY 9.0 - OVERSEE ADMINISTRATION

TASK 9.4

Locate, Maintain, Interpret, and Apply Marine Corps/MCCS Policies, Orders & DoD & SECNAV Instructions

DO THIS TASK WHEN

- You receive a new or revised policy, Order or Instructions.
- You need to verify that upcoming decisions or actions are legal, authorized, ethical, fair, applicable, and/or appropriate.
- You are unclear if a decision, action, or direction is guided by a specific policy, Order or Instructions.
- You believe a decision, action, direction, or request may be contrary to an existing policy, Order or Instruction.
- You are preparing to take an action or make a decision in an area that neither you nor any of your staff has ever dealt.
- You are asked whether decisions or actions are (or were) legal, authorized, ethical, fair, applicable or appropriate.
- You need waiver or relief guidance on policy.

REFERENCES

- All *applicable, current* Department of Defense (DoD), Department of Navy (DON) and Marine Corps instructions, policies, and Orders.
- All *applicable, current* local Command and MCCS Program instructions, policies, Orders, and standard operating procedures (SOPs).
- SECNAVINST 5215.1 (series), Department of the Navy Directives Issuance System.
- The bibliography provided after page 9.4.20 which lists current, *critical*, and applicable MCCS:
  - Instructions and policies.
  - Program guides.
  - Management information.
  - Performance job aids.

SUPPLIES/ RESOURCES

- Applicable instructions, policies and Orders.
- DoD Single Line Item Release/Receipt Document, DD Form 1348-1.
- www.dtic.mil/whs/directivies to order all directives and instructions that are stocked by Defense Automated Printing Service (DAPS), Philadelphia, PA. (The address is NOT case sensitive.)
- http://neds.nebt.daps.mil to see and download SECNAV and OPNAV directives, instructions and forms. (The address is NOT case sensitive.)
- www.usmc.mil
- www.usmc-mccs.org

THIS TASK IS DONE CORRECTLY WHEN

- New/revised policies, Orders and Instructions are reviewed and distributed to all applicable MCCS staff members.
- Applicable local SOPs exist, are current, and are available to all applicable MCCS staff members.
- Your staff is kept aware of up-to-date policy.
- Command is kept aware of up-to-date policy.
- Decisions and actions are legal, authorized, ethical, fair, applicable, and/or appropriate.
- Customers/patrons are made aware of applicable policies, Orders and/or Instructions.
- Marine Corps MCCS policies, Orders and/or Instructions are applied proactively to the benefit of the customers/ patrons and the Program.

NOTES

IMPORTANCE -- As an MCCS manager, it is your responsibility to know the legality, requirements, policy, and operating standards that surround your Program. It is also your responsibility to inform your staff of applicable MCCS policy.

BIBLIOGRAPHY -- The bibliography, located at the end of this task does NOT, by design, list every possible or available Department of Defense/Navy (DoD/DON) Marine Corps policies, Orders or Instructions relative to MCCS Program. Rather, it lists those policies, Orders and Instructions deemed *"critical"* by the MCCS Program Branches. The bibliography lists policies, Orders, Instructions, program guides, and MCCS Training, organized by MCCS PROGRAM functional areas.

This bibliography is current as of December 2004.

Headquarters (MR) and MCCS staff will periodically update this list and include revisions in future editions of the MCCS Managers' Desk Reference. These will only be given to course participants. It is **important** that you keep your bibliography up-to-date by adding, deleting, and editing it when:

- A peer or staff member attends an MCCS Managers' Course and receives the updated bibliography.
- You are advised or become aware that a revised Order, Instruction, or program guide has been issued.
- You are advised or become aware that former Orders, Instructions, or program guides have been cancelled, rescinded, or have become obsolete.
- You receive new or revised Orders, Instructions, and program guides.
- You check current policies on the Marine Corps/MCCS web site.

NOTES (cont.)

This bibliography has been reviewed, updated, and reorganized by the MR Branches (MRE and MRG).

This job aid provides a list of pertinent references and information resources that should be in MCCS libraries.

This MCCS bibliography does NOT list every possible Department of Defense/Navy (DoD/DON) instruction, policy, or order relative to MCCS operations. Rather, it lists only those policies, Orders and Instructions determined *"critical"*.

This bibliography is alphanumerically organized into nine groups specific to Marine Corps MCCS functions and two "general" groups. The bibliography lists policies, Orders, Instructions, program, guides, and MCCS Training as follows:

Group-1	Mission Essential **(CAT A)**.
Group-2	Financial Management.
Group-3	Personnel and Benefits.
Group-4	Training.
Group-5	Community Services **(CAT B)**.
Group-6	Facilities and Procurement.
Group-7	Computer Services.
Group-8	Policy and Management.
Group-9	Business Activities **(CAT C)**.
Group-10	None of the above/Miscellaneous.
Group-11	MCCS APF Activities.
Group-12	DoD Instructions.

To comment on the bibliography, please contact the Personal and Family Readiness (MRG).

PROCEDURE

Step 1 Ensure you maintain or have access to a *complete* and *up-to-date* library of critical MCCS policies, Orders, Instructions, and SOPs.

☐ Compare your existing library to the bibliography after page 9.4.20.

NOTE:	The bibliography does NOT list every available policies, Orders, Instructions, message, program guide, or course. It ONLY lists those identified by Personal and Family Readiness Division (MR/MRG) as being most critical and applicable to MCCS operations. Except for personal convenience, you probably don't need to maintain Orders, or Instructions that are available in other **"required"** departmental libraries. (I.e., Administration Department, Hospital/ Preventive Medicine, Comptroller, Chief Financial Officer (CFO), etc.) In cases where instructions are large or made up of multiple volumes, you may find more utility in reproducing only the applicable information/section(s). **CAUTION**--while this method of excerpting Instructions is handy, it's hard to keep current. ***Ensure these excerpts are current before applying them to decisions, actions, directions, etc.*** As time passes, you will be able to access more and more of these policies, Instructions, and procedures on the Internet.

☐ Order or obtain necessary policies, Orders, and Instructions. (See bibliography and the web sites for ordering guidance.)

☐ Refer to the MCO 5215.1 (series), Marine Corps Directives System for subject applications not listed in the bibliography.

- This instruction details the requirements to establish and maintain a publications and directives system.

☐ Provide your direct reports with a list (bibliography) of your library.

Step 2 Ensure your staff has access to a complete and up-to-date library of policies, Orders, Instructions, SOPs, MCCS Program Guides.

Step 3 Locate policies, Orders, Instructions, available MCCS training, general information, and program guidance in the bibliography.

IF YOU ARE LOOKING FOR:	THEN EXAMINE REFERENCES FOUND IN BIBLIOGRAPHY GROUP:
Navy Motion Picture Services.	0
Mission Essential **(CAT A)**.	1
Financial Management.	2
Personnel & Benefits.	3
Training.	4
Community Support **(CAT B)**.	9
Facilities and Procurement.	6
Computer Services.	7
Policy and Management Assistance.	8
Business Activities **(CAT C)**.	5
None of the above/Miscellaneous.	10
MCCS APF Activities	11
DoD Instructions	12
NOT FOUND.	Go To Step 4

Step 4 When unable to locate applicable references in your MCCS reference library, use alternative sources to obtain the necessary information.

These sources include, but are not limited to:

- Your professional network and professional organizations.
- Base resources--(HRO, Comptroller, Chief Financial Officer (CFO), Supply, Security, Fire, etc.).
- Local Internal Review personnel.
- Headquarters (MR)/MCCS Program Manager.
- Chain of command as appropriate and authorized.
- Internet/Intranet.

Step 5 Read the applicable policies, Orders, or Instructions that you identified in the previous steps, to confirm the appropriateness of your proposed actions.

IF POLICY GUIDANCE:	AND:	THEN:
Indicates action is legal, authorized, ethical, fair, applicable, and appropriate.	→	Continue with Step 8.
Indicates action is **ILLEGAL**, unauthorized, unethical, unfair, not applicable, or inappropriate.	You have a waiver.	1. Continue with Step 8. 2. Write memo explaining application of the waiver. 3. Keep your chain of command apprised of actions requiring waivers.
	You **DON'T** have a waiver.	1. **Alter or cancel proposed action/ decision.** **-OR-** **Request a waiver.** 2. Write memo for the record explaining the original proposal/ action and altered course of action/decision. 3. Keep your chain of command apprised of proposed actions, decisions, requirements that are not legal, authorized or waived.
Is unclear about the action being legal, authorized, ethical, fair, applicable, or appropriate.	→	1. Complete Steps 6 and 7. 2. Write memo citing interpretation. 3. Duplicate and route copies of the memo through your chain of command.

Step 6 When unable to *clearly* interpret or *directly* apply reference information, use alternative sources for clarification.

These sources include, but are not limited to:

- Your professional network and professional organizations.
- Base Resources--(HRO, Comptroller, Chief Financial Officer (CFO), Supply, Security, Fire, Legal Office/JAG, etc.).
- Local internal review personnel.
- Headquarters (MR) MCCS Program Manager.
- Chain of command as appropriate and authorized.

The goal of these inquiries is to ensure proposed actions/decisions are legal, authorized, ethical, fair, applicable, and appropriate.

Use these inquiries to explore action and/or decision alternatives.

Step 7 Decide what action to take when you disagree with **initial** interpretations or current policy, Instruction, or procedure.

IF:	THEN:
You do **NOT** want to reclama(*) the initial interpretation, or current instruction, policy, or procedure.	1. **Alter or cancel proposed action/ decision.** 2. Write memo for the record explaining the original proposal/action and altered course of action/decision. 3. Keep your chain of command apprised of proposed actions, decisions, requirements that are not legal, authorized or waived. 4. Continue with Step 8.
You want to (or should) reclama(*) initial interpretation, or current instruction, policy, or procedure.	1. Cite regulation. Prepare and submit narrative describing the essential nature of the situation. 2. Reclama the requirement, if applicable. 3. Seek relief through your immediate supervisor and the chain of command to obtain additional funding or waivers, or to make adjustments to the Program. 4. Record outcomes on memo for the record.

(*) reclama - argue, dissent, disagree with, reclaim.

Step 8 Carry out your proposed action/decision following published and applicable policy.

- Comply with policy by doing what's "right" and "proper".
- Use tact to explain alternatives when you are unable to meet the initial request or implement the initial proposed action/decision.
- Use common sense--don't "HIDE" behind policy when there are alternatives to fill requests, take actions, and make decisions.

NOTE:	**This is NOT to be construed as permission to operate in an illegal, unauthorized, unfair, or inappropriate manner.** What this does suggest, is that you make the extra effort to fulfill the request in a legal, authorized, fair, and appropriate manner. Find out what is REALLY desired, then determine what is the best way to meet the customers'/patrons' needs--whether internal or external customers/patrons!

Step 9 Prepare a memo for the record when actions/decisions are based on waivers or interpretations of gray areas about what is legal, authorized, ethical, fair, applicable, and appropriate.

Include the following data in the memo:

- ☐ Point of contact (POC).
- ☐ Other references cited as applicable.
- ☐ Application of caveats such as, "at the discretion of the CO".
- ☐ Facts/details of phone conversations.
- ☐ Dates of communications.
- ☐ Route copies of memo for the record through the chain of command as appropriate and authorized.
- ☐ File all memos for the record and retain them until you are comfortable that you are clear of unpleasant ramifications of the decision/action.

Step 10 Coach, counsel, and conduct on-the-job training (OJT) when your staff fails to carry out proposed actions/decisions in accordance with applicable policy. (See Task 4.3, Solve Performance Problems, Task 6.8, Monitor and Improve Staff Performance, and Task 6.5, Train/Develop Staff.)

To ensure their actions/decisions are legal, authorized, ethical, fair, applicable, and appropriate you need to:

- ☐ Know the rules, regulations, and policies.
- ☐ Stay abreast of changes in the rules, regulations, and policies.
- ☐ Communicate regularly, your expectations regarding adherence to the rules, regulations, and policies.
- ☐ Ensure you model what you expect--make sure your actions and decisions are always legal, authorized, ethical, fair, applicable, and appropriate.
- ☐ Document details of actions/decisions accomplished outside policy and/or waiver.
- ☐ Address details of actions/decisions accomplished outside policy and/or waiver with offenders immediately.
- ☐ Correct the results of inappropriate actions/decisions.
- ☐ Take every opportunity to reward appropriate performance!!!
- ☐ Ensure the skill, knowledge, and commitment to making legal, authorized, ethical, fair, and applicable actions and decisions by your direct reports is part of their annual reviews by:
    - Including the requirement in their goals and objectives.
    - Evaluating the requirement in their annual performance evaluations.

Step 11 Ensure your staff carries out their proposed actions in accordance with applicable policy.

- Require they comply with policy by doing what's "right".
- Require they use tact to explain alternatives when you are unable to meet the initial request or implement the initial proposed action/ decision.
- Encourage them to use common sense and not "hide" behind policy when there are alternatives to fill requests, take actions, and make decisions.

NOTE:	**Explain that this is NOT to be construed to operate in an illegal, unauthorized, unfair, or inappropriate manner.** What this does suggest is that they make the extra effort to fulfill the request in a legal, authorized, fair, and appropriate manner. They are to find out what is REALLY desired, then determine what is the best alternative to meet the customer/patron needs--whether the customer/patron is internal or external!

Step 12 Ensure your staff members have access to all applicable policy relative to their responsibilities.

- This can be accomplished through a variety of methods:

WHEN STAFF PERFORMANCE:	THEN:
Requires application of all or nearly all (50%-100%) of an policy, Order, or Instruction.	1. Give the staff member the entire policy, Order, or Instruction. 2. Create a tickler system to keep these issued copies current.
Requires application of a considerable amount (25%-50%) of a policy, Order, or Instruction.	1. DECIDE whether to give the staff member the entire policy, Order, or Instruction or prepare a local SOP to define the performance. 2. Create a tickler system to keep the issued policy, Order, Instruction or SOP current.
Requires application of a limited amount (5%-25%) of a policy, Order, or Instruction.	1. Prepare a local SOP to define the performance. See MCCS Manager Task 9.3, Develop Internal Policies/ Procedures (SOPs). (See SOP alternatives in next step.) 2. Create a tickler system to keep the issued policy, Order, Instruction or SOP current. Typically, this involves an annual review to ensure the SOP is correct.
Requires application of details NOT clearly defined in a policy, Order, or Instruction. (I.e., local requirements.)	

Step 13 Ensure **customers/patrons** have access to all applicable policies, procedures, rules, and instructions relative to Programs.

- This step is accomplished through the use of different media than the preceding steps. (These are alternatives to *formal* SOPs.)

- Disseminate policy, Instruction, and regulation for customers/patrons through use of:

  - Warning and caution signs.
  - Safety markers, barriers, etc.
  - Applicable control barriers..., fences, locks, etc.
  - Explanatory/directive/instructional signs.
  - Decals, door signs, posters, flyers, note-cards, etc.
  - Service/product price boards.
  - Eligibility information signs.
  - Hours of operation signs.
  - Marquees & electronic message centers.
  - Kiosks and computer consoles.
  - Live, specific situation audio/vocal announcements.
  - Newsletters, newspaper, closed-circuit TV, etc.
  - Copies of local SOPs and Command regulations posted in the service area and/or available at customer/patron service counters, reception areas, public posting areas, etc.

- Ensure these are professional in appearance and are accurate. Nothing is worse to a customer/patron than a rule that is/isn't any longer a rule, but no one knows it except the "establishment"!

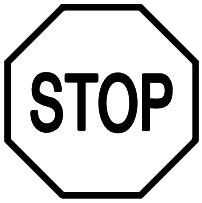
- **IMPORTANT**--***Train your front-line staff in customer service, tact & diplomacy, Marine Corps/government protocol, how to deal with difficult situations (communicate effectively), and all policies and Instructions relative to your Program!***

  Your front-line service representatives are your customers'/patrons' first and most often used information source about your Program's activities, events, products, and services.

Step 14 Ensure policy review, issuance, and responsibility is incorporated in all new-hire training. (See Task 6.4, Orientate/Indoctrinate New Staff Members.)

- ☐ Meet with each new staff member as soon as they report aboard and have completed basic in-processing through NAF/APF personnel/ payroll and admin.
- ☐ Don't review topics the new staff member has already received or is scheduled to receive.
- ☐ Discuss high impact policy, Orders, Instructions, SOPs, and the things you REALLY shouldn't do!
- ☐ Provide handout(s) of policy and procedures--typically a package of SOPs.
- ☐ Summarize each of the policy, Orders, Instructions, and SOPs.
- ☐ Emphasize your requirements for all staff members to make decisions and take actions in accordance with applicable policy, Orders, Instructions, and SOPs. Staff members are to be held accountable for this requirement.
- ☐ Provide bibliography listing all Orders, Instructions, procedures, and SOPs relative to the staff member's new position.
- ☐ Explain where all Orders, Instructions, procedures, and SOPs relative to his/her new position can be found.
- ☐ Encourage staff members to talk and ask questions before taking action.
- ☐ Schedule formal training opportunities.
- ☐ Schedule immediate OJT opportunities.
- ☐ Develop games and fun activities that introduce new Instructions/ changes and reinforce important Orders, Instructions, procedures, and SOPs.
- ☐ Schedule frequent meeting(s) with your new staff members to discuss and confirm their progress and answer their questions.

Step 15 Hold all full and part-time staff, aids, volunteers, and customers/patrons accountable for actions that are legal, authorized, ethical, fair, and appropriate.



Congratulations! You've completed this task.

MCCS BIBLIOGRAPHY

Are You Sure?

Check Your Reference Library!

Ensure your actions and decisions are legal, authorized, ethical, fair, applicable, and/or appropriate.

Be safe -- Be sure!

MCCS MANAGERS' DESK REFERENCE

TASK 9.4

Locate, Maintain, Interpret, and Apply Marine Corps/MCCS Policies, Orders & DoD SECNAV Instructions

*** * * BIBLIOGRAPHY * * ***

INTRODUCTION

This bibliography, has been reviewed, updated, and reorganized by MRG.

This job aid provides a list of pertinent references and information resources that should be in MCCS libraries.

This MCCS bibliography does NOT list every possible Department of Defense/Navy (DoD/DON) policy, Order, or Instruction, relative to MCCS operations. Rather, it lists only those policies, Orders, Instructions, determined *"critical"*.

ORGANIZATION

This bibliography is alphanumerically organized into nine groups specific to Marine Corps MCCS functions and one "miscellaneous" group. The bibliography lists policies, Orders, Instructions, program guides, and MCCS Training as follows:

Group - 1	Mission Essential **(CAT A)**.
Group - 2	Financial Management.
Group - 3	Personnel and Benefits.
Group - 4	Training.
Group - 5	Community Activities **(CAT B)**.
Group - 6	Facilities and Procurement.
Group - 7	Computer Services.
Group - 8	Policy and Management.
Group - 9	Business Activities **(CAT C)**.
Group - 10	Miscellaneous.
Group - 11	MCCS APF Activities.
Group - 12	DoD Instructions.

MAINTENANCE

This bibliography is current as of 1 Oct 2004.

Personal and Family Readiness Division (MRG) will periodically review and update this list and include revisions in future editions of the MCCS Managers' Desk Reference.

These will only be given to course participants. We do NOT plan to distribute periodic changes. Therefore, it is important that you keep your bibliography up-to-date by adding, deleting, and editing it when:

- A peer or staff member attends an MCCS Managers' Course and receives the updated bibliography.
- You are advised or become aware that a revised instruction, or program guide has been issued.
- You are advised or become aware that former Orders, Instructions, or program guides have been cancelled, rescinded, or have become obsolete.
- You receive new or revised Orders, Instructions, and program guides.

ADDITIONS, DELETIONS, CHANGES

To comment on the bibliography, please contact the Personal and Family Readiness Division (MRG) Training.

WHEN USED

The bibliography should be used to identify applicable policies, Orders, or Instructions, to:

- Verify upcoming decisions or actions are legal, authorized, ethical, fair, applicable, and/or appropriate.
- Determine if a decision, action, or direction is guided by a specific policy, Order, Instruction, or procedure.
- Determine if a decision, action, direction, or request may be contrary to an existing policy.
- Make a decision in an area that neither you nor any of the staff has ever dealt.
- Answer questions regarding whether decisions or actions are (or were) legal, authorized, ethical, fair, applicable, or appropriate.
- To confirm your files are complete.

HOW TO OBTAIN COPIES

IF THE DESIRED RESOURCE IS:	THEN ORDER FROM:
DoD/DON Policy Marine Corps/MCCS.	Station Administration. • Request NSN from Customer. Services at Supply Department. • Process request using DD-1348. • Intranet.
Personal and Family Readiness Division (MRE and MRG).	3044 Catlin Avenue Quantico, VA 22134-5099
CNI MWR Division Training Resources.	Commander, Navy Installations Millington Detachment Human Resources N253 5720 Integrity Drive Millington, TN 38055-6500
CNI Resources **OTHER** than DoD, DON Instructions, or Training Materials.	1. See address in the front section of volume one of this desk reference set.

NOTE: Also see the following Web sites:

www.dodssp.daps.mil to Order directives and instructions through Defense Supply Center, Philadelphia, PA. (The address is NOT case sensitive.)

http://neds.nebt.daps.mil for -- SECNAV and OPNAV directives Instructions and forms.

www.usmc.mil

www.usmc-mccs.org/director/policy/orders.asp

GROUP 1 -- MISSION ESSENTIAL MCCS Page 1 of 2; CAT A
Regulatory materials specific to athletics/sports, fitness, Semper Fit Recreation Programs.

#	REFERENCE TITLE	REFERENCE #
1	Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources	DoDINST 1015.14
2.	Programs for Morale, Welfare and Recreation (MWR)	DoDINST 1015.10
3.	Procedures for Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Support Resources	DoDINST 1015.15
4.	Marine Corps Community Service (MCCS) Policy Manual	MCO P1700.27 (series)
5.	Physical Fitness Program	MCO P1700.27 (series)
6.	Health Promotions Program Semper Fit	SECNAVINST 6100.5 MCO 6200.4A
7.	MCCS Composite Insurance Program Manual	MRG
8.	Commercial Sponsorship	Commercial Sponsorship Guidebook POC NPC-58 MCO P1700. (series)
9.	Marine Corps Semper Fit Program Manual	MCO P1700.29
10.	Operational Risk Management	MCO 3500.27A
11.	Marine Corps Safety Program	MCO 5100.29
12.	Marine Corps Ground Occupational Safety and Health (OSH) Program Manual	MCO P5100.8F
13.	Single Marine Program (SMP)	MCO 1700.36
14.	Marine Corps Lifelong Learning (LLL) Program	MCO P1560.25C
15.	Marine Corps Family Team Building (MCFTB)	MCO 1754.6

GROUP 1 -- MISSION ESSENTIAL MCCS Page 2 of 2; CAT A
Regulatory materials specific to athletics/sports, fitness, Semper Fit Recreation Programs.

#	REFERENCE TITLE	REFERENCE #
16.	Marine Corps Family Advocacy Abuse, Prevention and Treatment Programs	NAVMC 2930 (draft)
17.	Marine Corps Personal Services Manual	MCO P1700.24B
18.	Marine Corps Drug and Alcohol Abuse Prevention and Treatment Programs	NAVMC 2391
19.	Voter Registration Program	MCO 1742.1A
20.	Payment for Civilian Academic Degrees and Professional Credentials	MARADMIN 194/04

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GROUP 2 -- FINANCE, Page 1 of 1

Regulatory materials specific to APF & NAF financial operations.

#	REFERENCE TITLE	REFERENCE #
1.	Assignment of APF Personnel to MWR Activities	MCO 5321.1A
2.	Authority and Sources of Funds	MCO P7300.21, Chap 2,
3.	Object Class Codes. (Submission of unfunded requirements is handed differently from command to command. Interested parties should contact their local finance office for guidance.)	MCO P7300.21, Appendix D
4.	Financial Management Regulation Nonappropriated Funds Policy and Procedures	DoDFMR 7000.14-R, Vol 13
5.	Financial Responsibility	MCO P7300.21, Chap 1
6.	Funding of MWR Programs	DoDI 1015.10, Para 4.5 and 4.5.1
7.	MCCS Financial Management Policy	MCO P7010.19
8.	Field Budget Guidance Manual (APF)	MCO P7100.8R
9.	Standard Accounting Budgeting and Reporting System (SABRS)	MCO P7300.20
10.	Procedures for Establishment Management and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources	DoDI 1015.15
11.	Planning Programming and Budgeting (PPBS)	DoDD 7045.14
12.	NAF Procurement Manual	MCO P7010.2

GROUP 3 -- PERSONNEL, Page 1 of 1 *Regulatory materials specific to NAF and APF personnel.*		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	DoD Civilian Personnel Manual	DoDM 1400.25-M
2.	Marine Corps Nonappropriated Fund Policy Manual	MCO 12000.11A
3.	OPM Operating Manual, Federal Wage System Nonappropriated Fund	
4.	Employment of Retired Military Members of the Armed Forces	DoDINST 1402.01 16 Nov 94
5.	DoD Portability Program, A Guide for NAF Employees	MCO P5300.9
6.	A User Friendly Guide to the NAF/GS Employee Interchange Agreement	DoD/Open Agreement Aug 91
7.	Welfare to Work Handbook	DoD Apr 97
8.	Standards of Conduct and Government Ethics	SECNAVINST 5370.2J 15 Mar 89
9.	Nonappropriated Funds (NAF) Qualifications Standards	Qualification Standards Handbook X 118
10.	Military Spouse Employment Preference	SECNAVINST 12310.7A 13 Mar 90
11.	USMC Nonappropriated Fund Employee Benefits Handbook	NAF Benefits Handbook Jan 99
12.	Nonappropriated Fund Standardized Job Descriptions	MRG
13.	NAF Worker Compensation Procedures Guide	Desk Reference, MRG
14.	Local MCCS/Union Agreement (If have a recognized union)	
15.	Local MCCS/Union Agreement (If have an APF non-supervisory employees in MCCS)	

GROUP 4 -- TRAINING
MCCS Training Courses.

#	REFERENCE TITLE	QUOTA CONTROL
1.	Leadership Skills for Managers (LSFM)	MRG
2.	MCCS Managers' Course	MRG
3.	NAF Contracting - Advanced	MRG
4.	Applied Financial Planning	MRG
5.	CFSC Catering Professionals' Course	MRG
6.	CFSC Snack Bar Culinary Skills Course	MRG
7.	CFSC Catering Culinary Skills Course	MRG
8.	CFSC Full Service Culinary Skills Course	MRG
9.	CFSC Food & Beverage Management Course	MRG
10.	Senior Leaders Course	MRG
11.	Seven Habits of Highly Effective People	MRG
12.	World Class Customer Service Course	MRG
13.	Employment Law for Managers	MRG
14.	Strategic Business Planning I	MRG
15.	Strategic Business Planning II	MRG
16.	Fitness Training (Basic) Course	MRG
17.	Fitness Training (Advanced) Course	MRG

NOTE: The above provides a listing of some of the Headquarters (MRG) sponsored courses. MRG publishes an annual training catalog that explains the purpose and content of all of the courses offered, how to obtain quotas, POC's, addresses, phone numbers, course dates, information explaining how to request courses, and other items of interest regarding MCCS training. Contact your local training coordinator for additional copies of the current FY Training catalog and to apply to take a course. The catalog is also available on the MCCS Intranet "www1.usmc-mccs.org".

GROUP 5 -- COMMUNITY SERVICES Page 1 of 1, CAT B *Regulatory materials*		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	Child Care Programs for DON Military and Civilian Personnel	SECNAVINST 5300.32
2.	Marine Corps Children and Youth Programs	MCO P1710.30D
3.	SAC Instruction	DoDINST 6060.3
4.	Prevention of Child Abuse and Neglect in Youth Setting	Video
5.	Aquatics Programs and Facilities	MCO P1700.27 (series)
6.	MCCS Policy Manual	MCO P1700.27
7.	MCCS Composite Insurance Program Manual	MRG
8.	Criminal Background Checks	DoDI 1402.5
9.	Child Development Program	DoDI 6060.2

GROUP 6 -- PROCUREMENT

Regulatory materials specific to procurement.

#	REFERENCE TITLE	REFERENCE #
1.	Nonappropriated Fund Procurement Policy	DoDINST 4105.71
2.	Nonappropriated Fund Procurement Policy	SECNAVINST 7043.5A
3.	MCCS NAF Procurement Policy	MCO P7010.20
4.	MCCS Policy Manual	MCO P1700.27 (series)
5.	Financial Management Regulation Contract Payment Policy and Procedures - Vol 10	DoDI 7000.14-R

GROUP 7 -- COMPUTER SERVICES *Regulatory materials specific to*		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	MCCS Program Support Manual	MCO P1700.28
2.	Department of the Navy Policy for Content of Publicly Accessible World Wide Wed Sites	SECNAVINST 5720.47
3.	Department of the Navy (DON) Information Security Program (ISP) Regulation	SECNAVINST 5510.36
4.	Navy and Marine Corps on the use of CD ROM Technology	OPNAVINST 5230.24

GROUP 8 -- POLICY & MANAGEMENT, Page 1 of 2 *Regulatory materials specific to ALL MCCS Operations.*		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	Acceptance of Gifts	SECNAVINST 4001.2G MCO P1700.27 (series)
2.	Amusement Machine Operations in MWR Activities	MCO P1700.27 (series)
3.	Armed Forces Exchange Regulations	DoD Directive 1330.9
4.	Armed Forces Professional Entertainment Program Overseas	MCO 1710.23B
5.	Assignment of Responsibility to Counteract Fraud, Waste, and Related Improprieties Within the DON	SECNAVINST 5430.92A
6.	Award of Trophies and Similar Devices in Recognition of Accomplishments	SECNAVINST 3590.4A
7.	Command Management Economy, Efficiency, and Review	SECNAVINST 7510.9
8.	DoD Civilian Employee MWR Activities and Supporting NAFI's	DoD Directive 1015.8 and DoD Regulation 1015.8-R
9.	DON Civilian Employee MWR Activities and Supporting NAFI's	SECNAVINST 7548.1, CH-1
10.	DON Safety, Mishap Prevention, Occupational Health and Fire Protection Programs	SECNAVINST 5100.10H
11.	Establishment, Management, and Control of NAFI's	DoD Directive 1015.1 and SECNAVINST 5401.2
12.	Management of Audit Decisions and Follow-up Functions	SECNAVINST 5200.34D
13.	Marine Corps Community Service (MCCS) Policy Manual	MCO P1700.27 (series)
14.	Marine Corps Family Team Building (MCFTB)	MCO P1754.6A
15.	Marine Corps Aero Club Manual	MCO P1710.16E
16.	Establishment Management and Control of NAFIs and Financial Management of Supporting Resources	SECNAVINST 5401.2A

GROUP 8 -- POLICY & MANAGEMENT, Page 2 of 3 ***Regulatory materials specific to ALL MCCS Operations.***		
#	**REFERENCE TITLE**	**REFERENCE #**
17.	Private Organizations on DoD Installations	DoDINST 1000.15, NAVCOMPTMAN Vol. 7, CH-31, 075260 and 075261 MCO 5760.48
18.	Risk Management Manual	MRG
19.	Secretary of the Navy's RRRP Awards Program	SECNAVINST 1710.8
20.	Slot Machines, Purchase, Ownership, Operation, and Control	MCO P1700.30
21.	Navy and Marine Corps Tobacco Policy	SECNAVINST 5100.13C
22.	Trash and Waste Material Recycling Guidance	
23.	United Services Organizations, Inc.	DoD Directive 1330.12
24.	Vending Facility Program for the Blind on Federal Property	SECNAVINST 4535.3
25.	Operation of Morale, Welfare and Recreation Activities	SECNAVINST 1700.12

GROUP 9 -- BUSINESS ACTIVITIES, CAT C

Regulatory materials specific to food, beverage, & entertainment operations.

#	REFERENCE TITLE	REFERENCE #
1.	Marine Corps Community Service Policy Manual	MCO P1700.27 (series)
2.	Manual of Naval Preventive Medicine (Food Safety)	NAVMED P-5010-1
3.	Alcoholic Beverage Control	SECNAVINST 1700.11C
4.	Programs For Military Morale, Welfare, and Recreation	DoDINST 1015.10
5.	MCX Security and Loss Prevention Manual	MCO P4066.17
6.	ITT/Leisure Travel	MCO P1700.27 (series)
7.	Food Sanitation Training Program	SECNAVINST 4061.1C
8.	Armed Services Exchange Regulations (ASER)	DoDINST 1330.21
9.	Marine Corps Business Operations Manual	MCO P1700.30
10.	Food and Hospitality Operations Manual	NAVMC 2913 (series)
11.	Manual of Naval Preventive Medicine	NAVMED P5010 (series)

GROUP 10 -- OTHER Command, None of the above, or Miscellaneous ***General Administrative Materials relative to MCCS Operations.***		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	Marine Corps Technical Pubs System	MCO P5215.1
2.	DON Correspondence Manual	SECNAVINST 5216.5D
3.	DON Standard Subject Identification Codes	SECNAVINST 5210.11D
4.	Department of the Navy Privacy Act Program	SECNAVINST 5211.5D
5.	Department of the Navy Publications and Printing Regulations	NAVSO P-35
6.	Disposal of Navy and Marine Corps Records	SECNAVINST 5212.5C
7.	Official Mail Programs	MCO P5110.6B
8.	Public Affairs Policies and Regulations	SECNAVINST 5720.44A

GROUP 11 – MCCS APF ACTIVITIES
Regulatory materials

#	REFERENCE TITLE	REFERENCE #
1.	Lifelong Learning Program	MCO P1560.25C/ DoD Directive 1322
2.	Personal Services	MCO P1700.24B
3.	MCCS Policy Manual	MCO P1700.27 (series)
4.	Children and Youth Programs	MCO P1710.30D
5.	Lifelong Learning Program Manual	MCO P1560.25C
6.	Marine Corps Family Team Building (MCFTB)	MCO P1754.6A

GROUP 12 - DoD Directives - page 1 of 3		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources	DoDD 1015.14
2.	Procedures for Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources	DoDD 1015.15
3.	Military Morale, Welfare and Recreation	DoDD 1015.2
4.	Lodging Resource Policy	DoDD 1015.11
5.	Nondescrimination on the Basis of Handicap on Prgms & Act or Conducted by DoD	DoDD 1020.1
6.	Armed Services Exchange Policy	DoDD 1330.9
7.	Armed Services Exchange Regulations	DoDD 1330.21
8.	Family Advocacy Program	DoDD 6400.1

GROUP 12 - DoD Instructions - page 2 of 3		
#	**REFERENCE TITLE**	**REFERENCE #**
1.	Private Organizations on DoD Installations	DoDI 1000.15
2.	Smoke Free Workplace	DoDI 1010.15
3.	Programs for MWR	DoDI 1015.10
4.	Lodging Program Resources Management	DoDI 1015.12
5.	DoD Procedures for Implementing Public-Private Ventures for MWR Category C Revenue Generating Activities	DoDI 1015.13
6.	Family Centers	DoDI 1342.22
7.	Transitional Compensation of Abused Dependents	DoDI 1342.24
8.	Criminal History Background Checks on Individuals in Child Care Services	DoDI 1402.5
9.	Child Development Programs	DoDI 6060.2
10.	School Age Program	DoDI 6060.3
11.	Family Advocacy Command Family Assistance Team	DoDI 6400.3

GROUP 12 - DoD Standards- page 3 of 3		
#	REFERENCE TITLE	REFERENCE #
1.	Chapter 88 - Military Family Programs and Military Child Care	http://mfrc.calib.com/mcy/pdffiles/childcare_act.pdf
2.	National Defense Authorization Act for Fiscal Year 2000	http://mfrc.calib.com/mcy/lpg_ndaa.htm
3.	Child Development Programs (CDPs)	DoD Instruction 6060.2
4.	Criminal History Background Checks on Individuals in Child Care Services	DoD Instruction 1402.5

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

WHAT THIS DUTY DOES

Marketing, it has been said, is everything you do to *find* and then *keep* your customers/patrons. It is estimated that it costs you seven to ten times more to locate new customers/ patrons than to keep those you have.

Much of this desk reference set is focused on helping you "keep" your customer/patron. The tasks in this duty focus specifically on the customer/patron communication systems and methods necessary to keep your current customers/ patrons informed and to bring new ones to your Program.

People in public relations often use this analogy to explain their craft and marketing:

- When the circus is coming to town and you paint a sign about it, that's *advertising*.
- Put a sign on one of the elephant's back and march him/her through the middle of town, that's *promotion*.
- If the elephant walks through the middle of the mayor's rose garden, that's *publicity* (news).
- If you can get the mayor to laugh about it, that's *public relations*.

Therefore, among other things, you will find this task provides guidance about:

- Advertising.
- Promotion.
- Publicity (news).
- Public relations.

You will find guidance on the following tasks:

10.1 Identify Customer/Patron Communications System.

10.2 Prepare/Provide Public Information.

10.3 Assist With Media Events/Tours.

10.4 Use Advertising/Publicity/Promotion Equipment

10.5 Respond to Information Requests.

10.6 Develop/Maintain a Press Clippings File.

10.7 Represent the Organization.

10.8 Advertise & Promote Effectively.

10.9 Evaluate Advertising/Promotion Effectiveness.

10.10 Ensure Merchandising Effectiveness.

10.11 Create and Maintain a Focused Program Image.

Task 10.11 is an important 'starting point'. We encourage you to read this Task and apply it to your Program.

NOTE:	This Duty assumes you are planning and providing *'customer-driven'* activities, events, products, and services. If you are unsure of your customers'/ patrons' needs, wants, preferences, expectations, and priorities; or of current industry trends and fads; or what your competition is doing, see Duty 1.0, Tasks 1.1 through 1.5. You shouldn't spend your time advertising and promoting activities, events, products, or services that your customers/patrons aren't interested in or don't want!

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.1

Identify Customer/Patron Communications Systems

DO THIS TASK WHEN

- You want to communicate information about your Program's activities, events, products, services, benefits, prices, etc., to your customers/patrons.
- Feedback from comment cards, needs/preference surveys, quality callers, CSI/ASI, personal communications, etc., indicate a lack of customer/ patron knowledge about your Program.
- You want to communicate the results of your efforts to improve/alter customer service, benefits, or the image of your Program.
- A new, special or seasonal activity, event, product or service requires a different or unique method of communicating to your customers/patrons.
- You want to stay abreast of new opportunities to communicate with your customers/patrons. (E.g., via new businesses, trends, special interest groups, gatekeepers, etc.)
- You want to gather feedback about your Program's activities, events, products or services from your customers/patrons using face-to-face communications, comment cards, needs assessments, etc.

REFERENCES

- DODI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.

SUPPLIES/ RESOURCES

- Computer with modem.
- Survey/statistics software.
- Local needs/preference survey data/reports.
- Internet and e-mail access.
- Telephone.

THIS TASK IS DONE CORRECTLY WHEN

- Communications systems are in place to gather comments/feedback about your Program's customer/ patron service. (E.g., comment cards, personal communication, interest/needs surveys, etc.)
- Your customer/patron communications processes provide timely response to your customers'/patrons' expressed needs/preferences.
- Communications systems are in place to communicate information about your Program's activities, events, products or services. (E.g., flyers, program calendars, signage, etc.)
- Your customers/patrons are aware of your Program's activities, events, products and services and the benefits derived from participation.
- Your customers/patrons are able to make informed decisions about your Program's activities, events, products and services.

NOTES

Communications with your customers/patrons is essential to managing your Program effectively.

Information conveyed to your customers/patrons must be accurate, timely, sufficient in detail and appropriate to the intended target audience.

Likewise, you need to establish open lines of communication from your customer/patron to hear what they are saying about you, your staff, and the Program.

Identifying and using different communications systems is an on-going requirement. The underlying reason for having patron communications systems is to ensure quality customer service.

Your customers/patrons will appreciate the effort that goes into quality communications and will be far more likely to be an advocate and supporter of your Program if they know that you are concerned with their needs.

Most communication methods fall into the direct contact type. (E.g., personal communication, “interviewing” targets of opportunity, direct mail, signage, flyers, etc.) These methods usually are accomplished primarily by your staff and often with the assistance of the MCCS Marketing Office. Should you want/need to reach your off-base target populations, you will most likely coordinate these communications through the Command Public Affairs Office, your MCCS Marketing Office, or the MCCS chain of command. With the exception of “Direct Mail”, the media types listed on the next page are typically those used to communicate with a wide-range and off-base audiences.

The table on the next page lists seven media types and presents the advantages and disadvantages of each. You can use it to help decide which type media seems to best meet your communication need.

MEDIA COMPARISONS		
MEDIUM:	**ADVANTAGES:**	**DISADVANTAGES:**
Newspaper	Flexible; timely; good local market coverage; broad acceptance; high believability.	Short life; poor reproduction quality; small "pass-along" audience.
Television	Combines sight, sound, and motion, appealing to the senses; high attention; high reach.	High cost; high clutter; fleeting exposure; less audience selectivity.
Direct Mail	Audience selectivity; flexibility; personalization.	Relatively high cost; "junk mail" image.
Radio	Mass use; high geographic and demographic selectivity; low cost.	Audio presentation only; lower attention than television; non-standardized rate structure; fleeting exposure.
Magazines	High geographic and demographic selectivity; credibility and prestige; high-quality reproduction; good pass-along readership.	Long ad/article purchase lead time; some waste circulation; no guarantee of position.
Outdoor Signage	Flexibility; high repeat exposure; low cost; low competition.	No audience selectivity; creative limitations.
E-mail & Web sites	Low cost; long life; combines sight, sound, color, motion, etc.; high attention; high selectivity; flexibility; trackable; no ad competition within same medium; new medium.	Poor pass-along audience; high level of technical knowledge required. Some limitations due to local and government policy.

When planning to purchase/update advertising media, consider the following variables:

- Target-audience media habits. Different types of people prefer to use different types of media. (E.g., television and radio are the best media to reach both teenagers and seniors.)

- Your Product/Service. Media types have different potentials for demonstration, visualization, explanation, believability, and color.

- Message. A message containing a great deal of technical data might require specialized magazines or targeted mailings, whereas radio and television are good for quick, time-sensitive information. (I.e., sound and video bites vs. detailed, technical, and lengthy data.)

- Cost. Television is very expensive, whereas newspaper advertising is inexpensive.

PROCEDURE

Step 1 Review the following list of communications methods used to communicate information **to** your customers/patrons.

☐ Note which systems you currently use and those you should start using.
☐ Brainstorm other communication methods/ideas with your staff.

CUSTOMER PATRON COMMUNICATION SYSTEMS					
Use Now:	**Start Using:**	**Communication Method:**	**Use Now:**	**Start Using:**	**Communication Method:**
		• Personal communication • Station Indoctrination • Cable TV/CCTV • Radio • LAN/e-mail/MCCS Homepage • Base/Community newspaper • Electronic sign boards/Marquees • Flyers/Posters/Bulletin boards • Telemarketing • Direct mailing • Pre-printed messages on your correspondence (fax cover letters, MCCS letterhead, envelopes, business cards, note pads, etc.) • All Hands Meetings • "Town Hall" Meetings • Price lists/fee schedules • Targets of opportunity (points of sale, registration, etc.) • Video displays			• Employee name badges/ uniforms/"ask me" buttons • Display cases • Kiosks • Mobile outreach/vehicle signage • Telephone answering machine recordings • In-house/PA announcements • Table tents/counter cards • Mascots • MCCS logo items. (T-shirts/mugs etc.) • Program activity calendars • Job announcements/ newspaper ads • Photo walls • Coupons • Presentations to groups/organizations • Other _____ _____

NOTE: As you can see from this list, there are a lot of ways to communicate your Program's message and information. Be alert to the many opportunities available to you that are not controlled by your MCCS Program such as:

- Electronic message/sign boards at the Front gate.
- Commissary and Marine Corps Exchange bulletin boards and shopping bag inserts/ stuffers.
- Seasonal or product tie-ins with Marine Corps Exchange or Commissary.
- Program tie-ins with Medical, Dental, Family Services, etc.
- Contract fast food outlets to place displays, posters, place mats, etc.

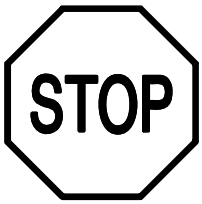
Step 2 Review the following list of communications methods used to get information/feedback **from** your customers/patrons.

☐ Note which systems you currently use and those you should start using.

☐ Brainstorm other communication methods/ideas with your staff.

CUSTOMER PATRON COMMUNICATION SYSTEMS					
Use Now:	**Start Using:**	**Communication Method:**	**Use Now:**	**Start Using:**	**Communication Method:**
		• Direct personal communication • Comment cards • Surveys • Questionnaires • Interviews (structured and unstructured) • Easy Line/Hot Line calls • Activity/event evaluations • Quality callers			• All Hands/Town Hall Meetings • LAN/e-mail • Focus groups • Presentations to groups/ organizations • Targets of opportunity (points of sale, registration, etc.) • Coupon validation/returns • CSI/ASI

Step 3 Communicate with your base Public Affairs Office (PAO), via your immediate supervisor, to identify the communication methods and processes you should use to reach off-base personnel and the general community.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.2

Prepare/Provide Public Information

DO THIS TASK WHEN

- You want to increase awareness and understanding about the benefits that your customers/patrons, individual work units, the Command, the community, and the Marine Corps derive from MCCS and your Program.
- You want to communicate how vital and critical MCCS Programs are to the quality of life for Marines, family members, and the Marine Corps community.
- You want to introduce a new MCCS Program activity, event, product, or service.
- You want to publicize changes to one or more of your Program's activities, events, products, or services.
- You want to publicize information about your Program's facility and operations. (E.g., hours/days of operation, closures, renovations, ribbon cuttings, etc.)
- You want to publicize data/information from surveys and trends.
- You want to attract/retain commercial sponsors as a result of increased visibility and expanded economic opportunity.
- You want to publicize your holiday, seasonal, or special activities, events, products, and/or services.
- You want to publicize information about your staff. (E.g., new hires, promotions, professional awards/recognition, retirements, etc.)

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4., Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- Broadcast the Benefits of Parks and Recreation, The Complete "Publicist in a Box", Jodi L. Rudick, Advisors Marketing Group, Oceanside, CA, 1997.

SUPPLIES/ RESOURCES

- Local media contact list.
- Program membership/mailing lists.
- Internet/Intranet addresses.
- www.usmc.mil
  www.usmc-mccs.org
  www1.usmc-mccs.org
- News/press release forms.
- Computer and desktop publishing software.

THIS TASK IS DONE CORRECTLY WHEN

- Customers/patrons/groups are able to make informed decisions about your Programs' activities, events, products, and services.
- Information about your Program's activities, events, products and services reaches the targeted customer/ patron groups.
- The benefits of your Program and MCCS are effectively communicated to your customers/patrons and various groups which ultimately aid in building program strength, and commitment, loyalty, and "buy-in" by your customer/patron, key decision makers, "gatekeepers", and the Command.

THIS TASK IS DONE CORRECTLY WHEN (cont.)

- The customer/patron is informed of staff new hires, promotions, professional awards/recognition, appointments, retirements, etc.
- Applicable information from surveys, industry trends, etc., which support your Program are effectively publicized to appropriate customers/patrons/groups.
- Your customers/patrons are informed of changes in your Program's activities, events, products and services in sufficient time for them to make decisions regarding Program participation.
- Your customers/patrons are informed of facility and operations schedules, changes, interruptions and cancellations caused by hours of operations, facility closures, renovations, ribbon cuttings, etc.

NOTES

Getting the word out about your Program is critical to your success.

The timeliness, accuracy, method of presentation, the appearance, and the information itself are essential to getting your customer/patron to respond positively.

In general, MCCS does a pretty good job of keeping people informed. Most MCCS Program have come a long way from the days of clip art, "cut and paste", and hand-written signs and notices. Many produce very high quality publications, brochures and calendars using state-of-the-art technologies.

Simply getting the word out may not be enough. It's what is being said (or more importantly, "read") that is critical to your success.

NOTES (cont.)

The words we need to convey to our customers/patrons are those which tell of the values and benefits of MCCS.

We often think in terms of outputs when we program our activities, events, products and services. We publicize the buffet, the youth center lock-in, the golf tournament, the fitness center, etc. And that is all well and good--people DO need to know the who, what, where, when and why.

But people make choices on how they spend their leisure time and money based on the benefits of participation--the idea of, "what's in it for me?"

When preparing a news/press release, creating a brochure, developing a calendar of events, or writing a radio/TV spot, think in terms of values and benefits to the customer/patron.

It is best to involve your staff, other colleagues, gatekeepers, and members of your target customer/patron groups when identifying the many benefits your Program offers.

Not only should you publicize the benefits to the customer/ patron, you should seek opportunities to promote how your Program benefits the Command, the local community, the environment, society, and/or the Marine Corps.

As an example, the values and benefits of participating in the "Youth Center Lock-In" can be presented like the following:

- <u>Individual Benefits</u>:
  - Meet friends.
  - Eliminate boredom.
  - Build self-esteem.
  - Learn new skills.

NOTES (cont.)

- Command Benefits:
  - Provides a safe place for children to play.
  - Increases program revenue.
  - Educates children and parents.

- Local and Marine Corps Community, Societal, and Environmental Benefits:
  - Reduces crime.
  - Strengthens neighborhoods.
  - Keeps kids in a safe environment.
  - Decreases vandalism.
  - Improves the public image.

The benefits listed above for the "Youth Center Lock-In" may very well have been generated through a brainstorming session involving you, your staff, parents, Base Security, Family Housing, and the Youth Center members themselves. Using influential and key groups or individuals such as these helps to build awareness of, and commitment to, your Program.

NOTE: This Task provides steps on developing a Publicity/ Promotion Plan and preparing a Benefits-Based News/ Press Release.

- Complete Steps 1 through 9 when developing your Publicity/Promotion Plan.
- Complete Steps 10 through 13 when preparing a News/Press Release to tout the benefits of your Program and MCCS.

Your Public Affairs Officer (PAO) can help you tell the MCCS story and market your good news features to local media. As a communications professional, the PAO can also assist you in telling your story Marine Corps-wide by using Marine Corps internal media. Keep your PAO in the loop and he/she will keep your MCCS Program in the spotlight!

PROCEDURE

DEVELOPING A PUBLICITY/PROMOTION PLAN

Step 1 Review the lists of communication methods from Task 10.1.

☐ Remind yourself of those communication methods you presently use in your Program and those that you plan to start using to disseminate information.

Step 2 Brainstorm, with your staff and other managers, ways to improve/expand communication methods.

NOTE: Address the effectiveness of each communication method you currently use.

Consider the following:

- Timeliness?
- Attractive, eye-catching presentations?
- Distribution points and methods?
- Information accurately conveyed?
- Reaching target customers/patrons?
- Ease of preparation?
- Ease of distribution?

Step 3 Prepare notes that describe the current perception of your Program including both the positives and negatives in your assessment.

Consider doing the following:

- ☐ Identify your customers'/patrons' biases and negative perceptions about the Program that you will want to focus on eliminating or re-shaping.
- ☐ Focus on the favorable perceptions that you want to strengthen.
- ☐ Ask yourself, "What are people saying about our Program?"
- ☐ Do you know what your customers'/patrons' and the Commands' "hot buttons" are--whether positive or negative?
  - Political or power-based challenges?
  - Specific customer/patron groups?
  - Finance-related? (E.g., fees/charges, deposits, price-gouging, good value, refunds, deposits, etc.)
  - Fun environment?
  - Command/unit level responsiveness?
  - Customer's/patron's best interest in mind?
  - Serving the needs of the staff at the expense of the customer/ patron? (Hours/days of operation, etc.)
  - Open-minded/flexible?

NOTE:	Knowing the "hot buttons" will help focus your attention on the customer/patron base. What you say and how you say it can accentuate the positive and lessen the negative feelings and perceptions of your Program.

Step 4 Develop goals for the publicity/promotion plan. (See Task 2.5, Provide Vision, Mission, Goals and Objectives.)

Consider what you want the publicity to do for your overall Program or for a specific activity, event, product sales, or service promotion.

- ☐ Do you want to increase sales/revenue?
- ☐ Do you want to increase active participation or just spectators?
- ☐ Are you trying to change an image or perception?
- ☐ Do you simply want to inform your customer/patron of opportunities and Program offerings?
- ☐ Are you trying to change participant behaviors through participation?
- ☐ Are you trying to develop support and advocacy for your Program and/or MCCS?
- ☐ What benefits do you want to present/deliver in your publicity/ promotion plan?

NOTE: Be as specific as possible when writing your goals. Make sure they are realistic and measurable.

Examples:

(1) To expand participation of base intramural sports program to include co-ed and civilian participation in at least one new league in each major sport.

(2) To communicate how vital and critical the Youth Program is to the quality of life of the children and families residing in base housing.

(3) To gain Command support of the Youth Program by obtaining the full, authorized share of APF each fiscal year.

(4) To increase participation in the youth sports programs by 25%.

Step 5 Using the information from Step 2, list the selected media methods you will use to reach your target customer/patron group.

- ☐ Base/regional military newspaper.
- ☐ Local community newspaper, via PAO.
- ☐ Fliers/posters.
- ☐ Radio.
- ☐ Cable TV/CCTV/in-house video.
- ☐ Word-of-mouth.
- ☐ PA announcements.
- ☐ Sign boards/marquees/electronic message boards.
- ☐ Internet/Intranet, e-mail, local MCCS web site.
- ☐ Direct mail.
- ☐ Other:

_____

_____

_____

_____

_____

Step 6 Develop 4-6 objectives (tasks) to reach your goals. (Refer to Task 2.5, Provide Vision, Mission, Goals and Objectives.)

Example Objectives:

- Produce a videotape using footage of various intramural sports competitions to show at base-wide meetings by 20 February.
- Meet with base and tenant command activities to prepare brochures for family and youth summer programs by 10 April.
- Employ marketing staff and hobbyist photographers to take pictures of selected activities and events to create a photo board for display in selected facilities on base and update each quarter.
- Write a minimum of 2 news/press releases each week for publication in the Hornet Gazette and the Desert Star newspaper.
- Construct mailing list for direct mail of monthly program calendar within 2 weeks.
- Update the Children and Youth Program section of the MCCS Homepage with photos, interviews, testimonials and upcoming activity and event schedules bi-weekly.

Step 7 Assign/coordinate responsibilities to perform each of the objectives.

Step 8 Determine the budget necessary to accomplish the overall plan.

Step 9 Prepare a time line for the implementation of the plan.

- ☐ When will you begin your publicity/promotion?
- ☐ What are the significant milestones in the course of the plan?
- ☐ When do you need to complete the plan?

PREPARE A BENEFITS-BASED NEWS/PRESS RELEASE

NOTE: One way to present your message about the benefits of MCCS and/or your Program is through a news or press release.

The following steps are guidance on preparing an effective news/press release. Ask your Command PAO and the editorial staff of the local/regional newspapers that you use frequently for their assistance. They may suggest a format different from that which is presented here.

When drafting your news/press release, it's important to keep some things in mind regarding the format and presentation of the release.

- Use Command/MCCS letterhead.
- Use only one side of paper.
- Double space.
- Use multi-sensory language. (I.e., colorful, vivid, and expressive.)
- Don't use hype or unfamiliar jargon or acronyms.
- Double check accuracy. (E.g., names, dates, times, places, etc.)
- Check and re-check for misspellings.
- Edit thoroughly.

Step 10 Write the headline.

The headline serves several purposes:

- Tells the editor what your news/press release can do for the readers.
- Includes the major benefit you want to convey.
- It tells the editor what your Program can do to help solve their reader's problems or meet a need.

Example Headlines:

- "Lunchtime Exercise Reduces Stress."
- "Skills for Life Taught at Golf Course."
- "Playground Safety #1 at Youth Center."

Step 11 Develop the lead paragraph; sometimes called "The Hook".

NOTE:	This is the most important part of the news/press release and it must grab both the editor's and the reader's attention.

Your lead paragraph should:

- ☐ Be written in concepts, not just words.
- ☐ Convince the editor and the reader to want to read further.
- ☐ Be interesting, factual, statistical, and intriguing.
- ☐ Be a "grabber". (E.g., a quote, shocking statistic, anecdote, trivia, etc.)
- ☐ Pique curiosity.
- ☐ Make an offer the reader can't refuse.
- ☐ Present an old fact in a new way.

Step 12 Write the body of the news/press release.

For maximum effectiveness:

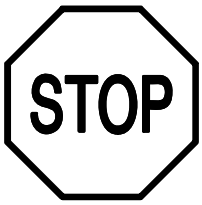
- ☐ Say more with less--watch for excessive wordiness.
- ☐ Write in the active voice.
- ☐ Break down your main points with subheadings and subtitles.
- ☐ Use quotes to give credibility and testimonial.
- ☐ Be objective--state facts, solutions, guidelines.
- ☐ Use more verbs and nouns than adjectives and adverbs.
- ☐ Allow your Marketing Staff and the media editor to add the flavor and color to your release.
- ☐ Use photos to help tell the story. **(See sample Photographic Consent letter, release form, and hold harmless agreement at the end of this Task.)**
    - Photos increase your chances of making it to print or on the air by 50%.
    - Get signed permission from photograph subjects when their pictures are taken. **(See photo release form and hold harmless agreement at the end of this Task.)**
    - Keep your photo caption short--no more than 40 words.
    - Write the caption in the present tense--it helps readers feel involved.

Step 13 Write the call-to-action paragraph.

This is the last, or closing, paragraph of the news/press release. It is also the part of the release in which to:

- "Sell" your Program, activity, event, product, or service.
- Make any "freebie" offers.
- Tell the reader what to do or where to go to get more information.
- Offer a reliable location/point of contact with phone number.

See sample news/press release on the following page:



Congratulations! You've completed this task.

SAMPLE NEWS/PRESS RELEASE #1
Page 1 of 2

Marine Corps Base, Camp Lejeune
MCCS Program

For Immediate Release
Monday, 15 April XXXX

Contact: Rick Estes, MCB Children and Youth Programs Director
(123) 456-7890

PLAYGROUND SAFETY #1 AT YOUTH CENTER

Playground surfaces and equipment will contribute to more than one million accidents, this year alone, involving children ages 5 - 10 years of age. Bumps, bruises, scrapes, and breaks may be part of childhood, but at MCB Camp Lejeune Youth Center, the children, parents, and program staff are working hard to reduce this frightening statistic.

Leading a group of volunteer parents, children, and civilian workers in this effort is Gunnery Sergeant Bert Parks. GySgt Parks, and about 30 other concerned parents and teens have been busy working to improve existing youth playgrounds and also sharing ideas for the construction of two more playgrounds to be installed in the base housing area. “Our last few weekends have been spent doing everything from sanding wood timbers to tightening bolts to sifting through the wood chips and sand surfacing--all to make this a safer place for our children to play”, explained Parks.

The need for these improvements and safety measures came about when Rick Estes, Youth Programs Director assisted by the base Maintenance Department, conducted an inspection of each of the base playground areas. Estes stated that the MCCS Program had partnered with the National Recreation and Park Association (NRPA) and the National Playground Safety Certification Program here at Desertville. “The regular and very thorough inspection processes and meeting the national safety standards to achieve certification will definitely make our playgrounds and equipment a much safer and fun place.”

SAMPLE

SAMPLE NEWS/PRESS RELEASE #1
Page 2 of 2

PLAYGROUND SAFETY #1 AT YOUTH CENTER (cont.)

The volunteers, which recently adopted the name "Partners for Playgrounds", have not only set their sights on improving the three existing playgrounds, but also on the design and installation of two new playgrounds to be installed this Spring in the base housing expansion areas. Even the younger set got into the act as they played with scale models of each of the playgrounds, maneuvering them into position and adding or removing slides, chutes, climbers, tire swings and rope ladders to create "their" ideal play environment. "We got to make the playground into what we think would be really cool--not just what our parents think," exclaimed eight-year-old Ashley Newton. Ten-year-old Mark Simpson, along with his parents Lt Dave and Trina Simpson, pitched in and worked last weekend on the project. "My friends and I had a lot of fun and we got to use some neat tools, too!", remarked the younger Simpson. The new playgrounds, slated for installation before the school year is out, will feature the latest in playground technology and safety. The playground surface itself, which is a contributing factor in reducing injuries, will be a synthetic material made from such things as recycled tires and plastic milk cartons that will greatly cushion falls and reduce the impact on young, developing bones.

SAMPLE

If you'd like to help out with the "Partners for Playgrounds", call Rick Estes at the Youth Center at (123) 456-7890 for more information. Explains Estes, "On-the-job training will be provided for the less-skilled. All we need you to bring is a desire to do good for the Camp Lejeune community and a good supply of 'elbow grease'!"

SAMPLE NEWS/PRESS RELEASE #2
Page 1 of 4

NEWS RELEASE
Headquarters, United States Marine Corps
Manpower and Reserve Affairs
3280 Russell Road
Quantico, VA 22134-5099

Contact: Ingrid Mueller
Semper Fit Affairs
13 March 20XX

MCCS Programs and Services Help Meet Semper Fit Challenge

With increased operational tempo and the long fight against terrorism ahead, it's more important than ever for the Marine Corps Community Services (MCCS) programs and services to help meet the special needs of our Marines deployed around the world.

The Semper Fit challenge for MCCS professionals is to assist Marines in achieving personal readiness to ensure the Marine Corps is an effective force. In an overseas or at-sea environment, this often means being creative and innovative in offering fitness and recreation opportunities.

"We take care of our Marine's as equitably as we can," said Maj Mike Powell, head of the Marine Corps' Semper Fit Program. "When Marines have some time off we have to be able to come to the rescue, and we try to dial in on what the Marines are asking for," he said.

SAMPLE

SAMPLE NEWS/PRESS RELEASE #2
Page 2 of 4

The core programs and services designed to help deployed Marines better perform mission requirements are fitness equipment, afloat fitness and recreation directors, recreation and sports gear, Learning Media Resource Centers (LMRC), movie program services and Fleet entertainment.

"We're trying to make a difference in our Marines' lives overseas and at sea environments," said Powell. He added that Marine Corps Semper Fit program is responsible for promoting healthy lifestyles through fitness, health promotion, sports and leisure programs, and that he welcomes feedback from on their issues and concerns.

"Five years ago, most ships didn't have fitness programs at sea. Now, to maintain high fitness standards for deployed support, we ensure all ships are fully equipped with quality fitness equipment before they deploy," said Powell. "We have also pre-positioned equipment at major concentration areas to permit us to change out fitness equipment as it wears out from heavy use from embarked Marines and Sailors" he said.

MCCS continues to look for new ways to provide recreation opportunities to those Marines and Sailors who prefer alternatives to working out in fitness rooms aboard ship, or to those who are deployed around the world.

SAMPLE

SAMPLE NEWS/PRESS RELEASE #2
Page 3 of 4

"Recreation Deployment Kits have been distributed to deployed units to provide positive leisure opportunities for Marines. The kits include all kinds of games and sports equipment, anything from Game Boys to X-Boxes to hand-held video games," said Powell.

Watching movies is one of MCCS's/Navy MWR's most popular leisure activities provided to Marines and Sailors at sea, as each ship can maintain a library with more than 600 titles and receives a monthly shipment of 16 new movies. The afloat movie program is designed to provide movie screening in small groups, over ship television systems, or in large groups using the large screen equipment package known as Cinema at Sea Initiative (CASI).

"The Fleet can rely on us to provide new movies as fast as possible, as many as possible," said Ron Rossman, head of the Navy Motion Picture Service (NMPS) program. "We will continue our partnership with the film industry in creating opportunities to provide special movie program events for Sailors and their families," he said.

SAMPLE

SAMPLE NEWS/PRESS RELEASE #2
Page 4 of 4

NMPS will also continue to deploy Theater in a Box (TIB) units, which are innovative, self-contained movie systems consisting of a portable projector, screen, sound system and videotape player with 250 movies - all the equipment needed to run a movie program.

"These units give us the capability to provide quality service to forward deployed shore forces, including various personnel with special missions in support of the war on terrorism," said Rossman. "The Theater in the Box systems are going to places where no other MWR/MCCS programs or services exist, and we have been able to provide 25 of them so far--one unit for every request we've received," he explained.

SAMPLE

"Every entertainer I've worked with has been blown away by the professionalism and dedication of our Marines and Sailors," said Cheryl Anderson, special events and entertainment coordinator. "It's good for the morale of our Marines and Sailors too, who often times can't believe a famous person or band has traveled thousands of miles to perform for them," she said. "With this program," Anderson added, "I want Marines and Sailors to forget where they are for just a little bit."

For more information on Marine Corps and Navy MWR programs and services, please visit at www.usmc-mccs.org or www.mwr.navy.mil.

1710
MR
5 Oct XX

From: Commanding General, MCB

Subj: MARINE CORPS COMMUNITY SERVICES (MCCS) POLICY FOR USE OF CONSENT FORMS FOR COMMERCIAL USE OF PHOTOGRAPHS

Encl: (1) Consent to Publication of Photograph
(2) Standard Words for Registration/Entry/Hold Harmless Agreements

1. The guidance in this letter is provided to make activities aware of increased sensitivity to commercial use of photographs of individuals. Some patrons may not wish to have their photographs used for commercial purposes, (e.g., on a poster advertising an upcoming MCCS event). To prevent any potential conflicts, enclosure (1) is offered for use by local MCCS operations to obtain permission from an individual if their likeness will be used for commercial purposes.

2. Enclosure (1) must be signed before a photograph of an individual may be used as part of an effort to solicit future business. Photographs used in advertisements, posters, handouts, flyers, etc., to promote future business will require consent from any identifiable individual in the photograph.

3. Photographs taken for use in publications meant for an internal audience (e.g., MCCS employees or MCCS patrons) which are used to show events that have already taken place do not require the use of enclosure (1). For example, if photographs are used in support of a news article telling about an event that has taken place, no consent form is needed.

4. Local MCCS activities are responsible for obtaining signed releases if there is potential for interfering with an individual's right to privacy. Unintentional conflict can be avoided by following a few basic guidelines:

a. Obtain a release form, even if you initially intend only to use the individual's image for newsworthy purposes. Then the individual's photograph may be used in the future for other trade or commercial uses.

SAMPLE

Subj: MARINE CORPS COMMUNITY SERVICES (MCCS) POLICY FOR USE OF CONSENT FORMS FOR COMMERCIAL USE OF PHOTOGRAPHS

b. For children and youth under the age of 18, the release must be consented to and signed by a parent or legal guardian.

c. Make certain your caption accurately reflects the purpose of the photograph.

d. Take care when cropping a photograph not to alter the context in which the photograph was taken.

e. Obtain a signed release when using photographs in revenue-generated advertisement and promotional ads.

5. The statement in enclosure (2) shall be incorporated into registration/entry forms, membership applications, or hold harmless agreements, in which an individual's photograph may be used to promote/publicize similar upcoming MCCS programs, activities or events.

6. Enclosures (1) and (2) should always be reviewed by the local Staff Judge Advocate or Office of General Counsel attorney to ensure it complies with state law.

7. MCCS activities should begin using enclosures (1) and (2) immediately. For information concerning use of previously taken photographs, or if you have any questions, please contact MCCS Legal (C).

By direction

Distribution:
Commanding Officers
MCCS Directors
Semper Fit
PAD

SAMPLE

CONSENT TO PUBLICATION OF PHOTOGRAPH
(Check Only One)

☐ I hereby consent to (Name of Command) MCCS Program publishing, on any Marine Corps MCCS web sites or within its publications, the likeness and the name of (Individual's name) in a photograph taken on (date). The photograph was taken as part of the following activity: _____. I further consent to (Name of Command) MCCS Program promoting the interests of Marine Corps MCCS by sharing that likeness and (my) (my child's) name with commercial sponsors, news or community organization and allowing the commercial sponsors, news or community organization to publish the same.

☐ I hereby consent to (Name of Command) MCCS Program publishing, on any Marine Corps MCCS web sites or within its publications, the likeness and the name of (Individual's name) in a photograph taken on (date). The photograph was taken as part of the following activity: _____.

☐ I hereby consent to (Name of Command) MCCS Program publishing, on any Marine Corps MCCS web sites or within its publications, the likeness of (Individual's name) in a photograph taken on (date), provided that the publication or web site does not associate (my) (my child's) name with the likeness. The photograph was taken as part of the following activity: _____. I further consent to (Name of Command) MCCS Program promoting the interests of the Navy by sharing that likeness of my photograph with commercial sponsors, news or community organization and allow them to publish the same, provided that (Name of Command) MCCS Program does not share any information that associates (my) (my child's) name with the likeness.

☐ I hereby consent to (Name of Command) MCCS Program publishing, on any Marine Corps MCCS web sites or within its publications, the likeness of (Individual's name) in a photograph taken on (date), provided that the publication or web site does not associate (my) (my child's) name with the likeness. The photograph was taken as part of the following activity: _____.

SAMPLE ONLY

_____
(Signature of photo subject or minor's parent/legal guardian) (Date)

_____
(Print or type photo subject's name or minor's parent/legal guardian)

DISCLAIMER

The United States Government and Marine Corps MCCS are not liable for any damages or injuries resulting from publication of the above-identified information, except as provided in the Federal Tort Claims Act (28 U. S.C. §§2671-2680).

I hereby acknowledge that I have read the above disclaimer and understand it.

_____
(Signature of photo subject or minor's parent/legal guardian) (Date)

_____
(Print or type photo subject's name or minor's parent/legal guardian)

RECOMMENDED WORDING CONCERNING PHOTOGRAPHS FOR REGISTRATION/ENTRY/HOLD HARMLESS FORMS

I, _____, hereby give Marine Corps Community Services (MCCS)[COMMAND], Marine Corps, their agents and employees, and commercial sponsors of this event, if any, the right and permission to use, reuse, and/or publish photographic, audio, and video graphic materials of me while participating in a [TYPE OF PROGRAM, EVENT, ACTIVITY] of Marine Corps MCCS [COMMAND].

I do hereby waive the right to inspect and/or approve the photograph, audiotape, and/or videotape.

I further agree that those who act on behalf of Marine Corps MCCS [COMMAND] may transfer, use, or cause to be used, such photographs, audio tapes, and/or videotapes for promotional, recruiting, or educational purposes, or share with commercial sponsors, without any limitation, reservation, or compensation, other than the receipt of which is hereby given.

This consent is given for any photographs, audiotapes, and/or videotapes, which have been taken, or will be taken.

_____ _____
Signed Date

SAMPLE

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.3

Assist With Media Events/Tours

DO THIS TASK WHEN

- You have been directed to assist with a Command sponsored event or tour which has potential media interest.
- You have been directed to assist with an MCCS Program sponsored event or tour which has potential media interest.
- You are planning an MCCS Program activity or event for which you desire media coverage.

REFERENCES

- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4., Advertising Policy.
- MCO P1700.27 (series), MCCS Policy Manual.

SUPPLIES/ RESOURCES

- Base Public Affairs Office.
- Computer with word processing and graphics software.
- Example media kits from PAO and/or the MCCS Marketing Office.
- Media contact list.

THIS TASK IS DONE CORRECTLY WHEN

- You have attracted media interest and obtained the desired coverage of your activity or event.
- The media's needs and interests regarding the coverage of the event or tour have been positively addressed.
- The Command's needs and interests regarding the coverage of the event or tour have been positively addressed.
- Your assistance/coordination with the media presents the Command and the MCCS Program in a favorable light.
- The benefits of participation in your Program are accurately conveyed via the media coverage of your activity/event.

NOTES

As an MCCS Manager, your daily duties and actions are always "representing" the MCCS Program, the Command, and the Marine Corps. This is important to remember when dealing with the media, the public, or your customers/patrons because what you say will be construed as the "official position" of the Commanding Officer and the Marine Corps.

It is unlikely that you will ever have to deal directly with the media, unless prior approval has been given by the Command Public Affairs Officer (PAO)--the "official" spokesperson for the Commanding Officer.

In matters dealing with MCCS, and more specifically your Program area (aquatics, child development, golf, etc.,) you may be asked to provide information to the media and to assist them with coverage of an activity or event within your Program or the MCCS Program.

Your comments to the media will be based on your knowledge of the Program's activities, events, products, services, operations, policies, and the facts surrounding the activity or event.

Most often these activities and events are fun, exciting and very positive. (E.g., attempts at setting a Guinness Book Record; a human interest story; or the ribbon cutting of a new MCCS facility.)

Occasionally, the event may be one involving an accident, injury, death, property damage, or accusations of misconduct, inappropriate behavior, or unlawful acts. It is important in these situations to contact the PAO immediately and refer all media queries to the PAO.

NOTES (cont.)

You might also be tasked with assisting the media in their coverage of a Command sponsored event, that has only fringe association with MCCS, such as a base open-house, air show, or Change of Command. In these cases, you most likely will be provided detailed information about the Command's event, participate in planning and information meetings and briefings, and receive applicable media information/kits.

PROCEDURE

Step 1 Review all details and time lines of the activity, event, or tour for which you will be assisting the media.

- ☐ If an MCCS sponsored activity/event, obtain a copy of the detailed activity plan. (See Task 3.2, Prepare and Maintain Detailed Activity/ Event Plans.)
- ☐ If a Command sponsored activity/event, obtain a copy of the agenda and/or printed program.

Step 2 Meet well in advance of the event with the key individuals responsible for coordinating the activity/event.

Discuss the following:

- ☐ Date, time, place, and duration.
- ☐ Purpose, desired outcome, and expectations.
- ☐ Past history and potential problem areas.
- ☐ Activity/event flow.
- ☐ Controls and security.

Step 3 Contact the media representatives two to three days prior to the activity/ event to coordinate the date, time and location to meet.

Step 4 Ensure applicable security arrangements have been made for members of the media to come aboard the base, into the facility, and to be present at the activity/event.

Check with the following:

- Base/Regional Public Affairs Office (PAO).
- Base security.
- Vehicle passes and personal badges.
- Transportation. (Base Motor Transport or MCCS/GSA vehicle.)
- Meal arrangements/reservations.

Step 5 Greet media representatives assigned to cover the activity/event.

☐ Obtain the names and phone numbers of the media representatives from your base Public Affairs Officer.

☐ Be on the lookout for media representatives that show up unexpectedly to cover the event.

Step 6 Provide a media kit to each media representative.

A media kit might include the following:

- Cover letter.
- General news release.
- Supporting materials and information including a fact sheet.
- Photos/drawings/art work.
- Agenda or program including a timetable.
- "Event-at-a-Glance" synopsis.
- Appropriate information from previous similar events.
- Names, titles, and phone numbers of key individuals responsible for the coordination of the activity/event.

NOTE:	When an activity/event is sponsored and coordinated by MCCS, you and the MCCS Marketing and Publicity Office will most likely be responsible for the preparation of the media kit. Send courtesy copy of MCCS Program prepared media kits to PAO. In Command sponsored events such as an open house, change of command, dedication ceremony, etc., the media kit will most likely be prepared by and provided to the media by the PAO.

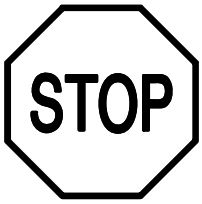
Step 7 Provide reasonable assistance to the media.

This assistance may include the following:

- Access to telephones.
- Reasonable use of fax machine.
- Driver/base escort.

Step 8 Make follow-up call to media point of contact (POC) within 48-hours following the activity or event to ensure their needs were met and questions answered.

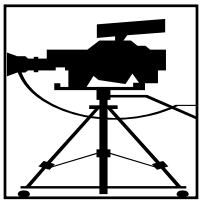
- ☐ Offer additional information, clarification, or assistance as applicable and within the scope of your responsibility and authority. (If in doubt, ask a senior official in your chain of command, then get back to the media.)
- ☐ Request copy (print, video, or audio) of the report or story.
- ☐ Offer "Thanks" from the MCCS Program/Command, as applicable.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.4



Use Advertising/Publicity/Promotion Equipment

DO THIS TASK WHEN

- You want to maximize the methods to communicate information about your Program's activities, events, products, services, and benefits.
- You want to ensure highest visibility and maximum exposure for your Program's activities, events, products, and services.
- You want to use alternative methods and media to supplement/complement your direct customer/patron contacts.

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- MCO P1700.27 (series), MCCS Policy Manual.

SUPPLIES/ RESOURCES

- Audio/visual (A/V), merchandising, and communication equipment and supplies including, but not limited to the following:
  - Video and digital cameras.
  - Poster printer and 36-inch design printer/plotter.
  - Small and large laminators.
  - TV/monitors.
  - Video record/play units (VCR).
  - Overhead projectors.
  - Electronic projectors.
  - Electronic message signboards.
  - Marquees.
  - Kiosks.
  - Bulletin boards.
  - Easels and chart pads.
  - Billboards, banners, magnetic vehicle signs.
  - Internet web sites/homepage.
  - Computer with applicable software.
- A/V, merchandising, and communication equipment, supplies, and service providers including:
  - MCCS Marketing Office.
  - On-base Marine Corps and MCCS Programs.
  - Off-base MCCS, DoD, and federal agencies/offices.
  - Off-base community agencies/offices.
  - Commercial businesses, vendors, contractors.

NOTE:	The quantities of equipment, supplies, and services you may need will depend on the size of your Program and the availability of these items from other on-base departments/offices.

- Task 10.1, Identify Customer/Patron Communication Systems.

THIS TASK IS DONE CORRECTLY WHEN

- You use available publicity/promotion methods, equipment, and supplies to effectively communicate your Program information to the widest appropriate audience(s).
- The information you present is accurate, current, attractive, eye-catching, and timely!
- The information complies with current MCCS, Command, or higher level policies regarding political correctness, public acceptance and legality.
- Your customers/patrons can *rely* on the information you publish/present.
- Your customers/patrons can make timely and informed decisions to use, purchase or participate based on the information you publish/present.

NOTES

The goal of media coverage is “to get the word out”. Typically, MCCS Program methods for advertising, promoting and publicizing begin with, and too often end with, print media. Monthly calendars, brochures, newspaper, flyers, and assorted other handouts may be the backbone of your promotion and publicity efforts, but you should also consider other media methods.

This task will address other than “paper” methods for promoting and publicizing your Program and presenting its message. The use of electronic equipment, signage, display cases, marquees, banners, etc., are but a few of the media methods which may be available to you.

Media choices are “typically” based on what’s available, but other reasons should be examined and considered.

NOTES (cont.)

Media choices should be based on:

- What the message is about.
- Advertising/promotion budget.
- Who the message needs to (or should) reach.
- Demographics of the targeted population(s).
- Time requirements/constraints.

It is best to use a variety of media as people are attracted to, and respond differently to, different types of media.

People who are visually oriented are typically attracted to signage and more inclined to *read* your message. Those who are sound oriented will typically prefer to *listen* to your message.

Not only do these personal preferences dictate how a message is best communicated, but often environmental factors play into your media selections as well.

For example:

- A person who works at a desk much of the day may have more opportunity to access your e-mail, browse your web site, or read about your Program in the base newspaper and similar "print" media.
- On the other hand, someone who spends most of their day working outside, on their feet, or driving, may rely more on visual or verbal communications. (E.g., electronic sign boards, marquees, vehicle mounted ads/signs, P/A announcements, etc.).

NOTES (cont.)

Info-overload! Keep in mind how much we are all bombarded with messages and info of every sort, every day! Newspapers, magazines, junk mail, memos, road-side and building signage, plans-of-the-day, phone calls, e-mail, TV and radio ads, fax ads..., you get the picture!

Your messages need to be unique in both design and delivery to avoid being ignored or lost in the short-term memory of your customers/patrons.

This task will present equipment-related ideas, which you can use to make your advertising, publicity, and promotion more effective and ultimately attract more customers/patrons, more often.

This task does **NOT** deal with your routine operational processes that may also need A/V equipment and supplies. That information is provided elsewhere in the MCCS Managers' Desk Reference.

For example, a fitness program may rely heavily on a music playback system; the snack bar on a P/A system to announce orders; or the accounting office using an overhead projector to present a financial brief.

See the following:

- Task 3.2, Prepare and Maintain Detailed Activity/Event Plans
- Task 3.3, Conduct MCCS Program Activities/Events.
- Task 10.11, Ensure Merchandising Effectiveness.

This task focuses specifically on the communication equipment and supplies you may need to advertise, promote, and publicize your Program--that is, "to get the word out!"

PROCEDURE

Step 1 Complete Task 10.1, Identify Customer/Patron Communication Systems.

Step 2 Identify which of the following advertising/publicity/promotion resources are available from your Program, from the Base Program, or from other **on-base** Departments/Offices.

	WHO HAS EACH MEDIA TYPE AVAILABLE?		
Media	**MCCS Program**	**MCCS Dept**	**Command**
Banners/posters.			
Bulletin boards.			
CCTV/CATV and Radio.			
Direct e-mail and Websites.			
Display cases/cabinets.			
Easels/paper.			
Electronic message boards.			
Electronic projectors.			
Flyer racks.			
Kiosks.			
Marquees.			
Movie leads and trailers.			
Multi-media projectors.			
PA Systems.			
PA Systems.			
Personal/laptop computers.			
Photo story boards.			
TV/monitors.			
Vehicle signage/sign systems.			
Video cameras.			
Video recorder/play-back units (VCRs).			
Write-on/wipe-off boards.			
Other:			

NOTE: Sources may include Marine Corps Exchange, Commissary, Base Training Department, PAO, Automated Data Processing, Defense Automated Printing Service (DAPS), Chapel, Family Services, Medical/Dental, Galley, HRO, BQs/VQs, Credit Union, Base Theater, etc.

Step 3 Identify which of the following advertising/publicity/promotion resources are available from **off-base** resources. (E.g., Marine Corps, DoD, Federal Agencies/Offices, community agencies/offices, vendors/contractors, etc.)

	WHO HAS EACH MEDIA TYPE AVAILABLE?		
Media	**MCCS Program**	**MCCS Dept**	**Command**
Banners/posters.			
Bulletin boards.			
CCTV/CATV and Radio.			
Direct e-mail and Websites.			
Display cases/cabinets.			
Easels/paper.			
Electronic message boards.			
Electronic projectors.			
Flyer racks.			
Kiosks.			
Marquees.			
Movie leads and trailers.			
Multi-media projectors.			
PA Systems.			
PA Systems.			
Personal/laptop computers.			
Photo story boards.			
TV/monitors.			
Vehicle signage/sign systems.			
Video cameras.			
Video recorder/play-back units (VCRs).			
Write-on/wipe-off boards			
Other:			

NOTE: Sources may include local school system, local recreation and parks agency, libraries, local military and federal agencies, regional offices, vendors, contractors, and local businesses.

Step 4 Select those resources you want to use which are appropriate to promote your Program and the message you want to convey.

NOTE:	If the applicable media is NOT yours, contact (through your chain of command), the person/office/agency that has the equipment you want/need to use.

Step 5 Prepare the message/information you want to present using the selected resource(s). (See Task 10.8, Advertise & Promote Effectively.)

Check for the following:

- ☐ Media is appropriate for the message.
- ☐ Message/information is accurate, complete, and timely.
- ☐ Provides sufficient information, but is neither overwhelming, nor so small or insignificant as to go unnoticed.
- ☐ Location will reach the intended target audience.
- ☐ Cost of presenting message/information is within your budget.
- ☐ The ad/information effectively "sells/promotes" the Program.
- ☐ The ad/information/promotion is eye-catching/appealing.
- ☐ The ad/promotion causes a positive impact and lasting impression.
- ☐ The facts are correct.
- ☐ Evry wurd iss speled korrectily! ☺
- ☐ The grammar is correct.
- ☐ The ad/information/promotion is politically/societally correct/ appropriate.

NOTE:	Use the expertise of your MCCS Marketing Office when preparing ads, promotional messages, and similar information pieces.

Step 6 Periodically inspect your ads, messages, and information to ensure quality.

Check the following:

- ☐ Carelessness in message set-up or installation.
- ☐ Damage due to weather or vandalism.
- ☐ Cleanliness/general maintenance.
- ☐ Electronic signs are operating properly.
- ☐ Advertised products and services are available.
- ☐ Timeliness/currency of ad/information.
- ☐ Changes to fees/charges.
- ☐ Removal/change of message when outdated.

Step 7 Continue to look for new ways and opportunities to present your message.

Stay informed about:

- ☐ Communication, advertising, promotion, and publicity trends in your industry.
- ☐ What your competition is doing.
- ☐ What attracts your target audience?
- ☐ New resources/businesses on and off-base.
- ☐ Advances in advertising, communication, and promotional equipment, supplies, and technology.

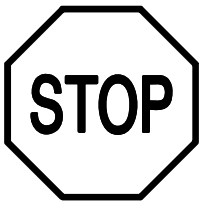
Step 8 Routinely evaluate the effectiveness of your use of different media methods. (See Task 10.9, Evaluate Promotion/Advertising Effectiveness.)

Step 9 Look for opportunities to market the programs creatively.

Example:

- Sell bottled water with custom labels listing the Program's name, address, phone number(s), and perhaps a Point of Contact (POC).

- Distribute custom designed air fresheners as cars leave the base. These "reminders" could be shaped/designed (and scented) to *represent* the activity or event and imprinted with the Program's name, address, phone number(s), and/or a Point of Contact (POC). Etc.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.5

Respond to Information Requests

DO THIS TASK WHEN

- You have received a request for information about your Program or personnel from members of the media, writers, researchers, professional colleagues, students, etc.
- You receive a request for information under the guidelines of the Freedom of Information Act (FOIA).
- You receive a request from, or via your immediate supervisor to provide input for a talking/point paper.

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- Freedom of Information Act of 1966, 5 USC, Sect 552.
- The Privacy Act of 1974, Sect 552a.
- MCO P1700.27 (series), MCCS Policy Manual.

SUPPLIES/ RESOURCES

- MCCS/Navy Legal Services Officer.
- Base Public Affairs Office (PAO).
- Current and past base/local newspaper articles.
- After-action reports and evaluations of your Program's activities and events.
- Financial records.
- Personnel records.
- Archives/past records in your files.

THIS TASK IS DONE CORRECTLY WHEN

- Response to requests is done within the limits of laws and regulations governing dissemination of the requested information.
- All provided information is accurate and supported by factual documentation.

NOTES

It is important to remember when dealing with these requests from outside agencies, competitors, the media, or the general public, that you are always representing the MCCS Program, the Command, and the Marine Corps.

What you say or provide will be construed as the "official position" of the MCCS Program, the Commanding Officer and the Marine Corps.

If in doubt, you should always clear information requests from outside agencies through the base MCCS Legal Officer (NLSO) and Public Affairs Officer (PAO)--especially if the request hints of security or privacy issues.

Requests for information about your MCCS Program may come from a variety of sources such as competitors, students, trade publications, professional colleagues, and the media.

NOTES (cont.)

The Freedom of Information Act (FOIA) provides the public access to records in the possession or control of the Executive Branch of the federal government. The FOIA is a disclosure law which says all information in the possession of the government is releasable except for nine specific categories. None of these nine categories deal with information related to MCCS activities, but are concerned with national security and other related subjects.

The FOIA does not **require** that exempted information be withheld, but rather **permits** it to be withheld. The NLSOs and PAOs are taught that the spirit of the guidance is to release, not withhold information. This is in keeping with the DoD policy of "maximum disclosure with minimum delay".

In addition to the FOIA, the Privacy Act also provides guidance on the release of information about individuals. Some information may be released as a matter of public record, such as name, awards and decorations, etc. Generally speaking, any information about, or photographs of, military or civilian personnel must first be coordinated through, and approved by, the installation PAO.

Requests from the media must be coordinated through the PAO.

The type of information you are likely to have requested is information about participant numbers, fees and charges, hours of operations, eligible users, program information, etc. Following the steps in this task will guide you to the correct decision regarding the release of this or other potentially sensitive or controversial requests.

PROCEDURE

Step 1 Determine how to respond to information according to the source of the request.

IF SOURCE OF REQUEST IS:	THEN:
Media.	1. Get the information from the requestor. See Step 2. 2. Inform your immediate supervisor of the "media request". 3. Contact the Public Affairs Office (PAO) and advise them of the nature and source of the request. 4. Assist the PAO in researching and providing the information as directed.
Other.	Continue with Step 2.

Step 2 Obtain and record the following information from the person making the request.

- Name and title.
- Organization/affiliation.
- Address.
- Telephone numbers. (Including fax, e-mail, Internet, etc.)
- How, where, and when the information will be used, and why/to what end.

NOTE: **Don't accept this information at face value.**

Depending on the situation, the request, and how you "feel" about the request, you may want to check the accuracy of the details you have been given.

Step 3 Decide who should provide information requested based on the requestor and/or the intended use.

IF REQUESTED INFORMATION IS CONSIDERED:	AND:	THEN:
Sensitive or classified (e.g., personal, potentially controversial, etc.).	→	1. Refer request to your immediate supervisor or the MCCS Director. 2. Go to Step 4.
Non-sensitive or unclassified (e.g. usage, program information, fees, prices, charges, hours of operation, etc.).	Your response can be given on the spot.	1. Provide the information. 2. Document the request and details provided and file. 3. STOP Here.
	Response requires research because of complexity, or needs statistical data and supporting documents.	1. Ask requestor to submit request in writing. 2. Continue with Step 5.

Step 4 Meet with your immediate supervisor or the MCCS Director to discuss the request and to get his/her approval/disapproval on providing the information requested.

IF:	THEN:
Approved.	1. Make notes from the meeting with your immediate supervisor or MCCS Director of guidance and directions you received. 2. Continue with Step 5.
NOT Approved.	1. Inform requestor that request for information is denied citing reasons supporting the denial. 2. Make notes from the meeting or communication including reason for not approving the request. 3. **STOP here.**

Step 5 Gather all necessary information you are likely to use.

- Check the information for accuracy.
- Have your immediate supervisor, a staff member, or a colleague familiar with the subject review and provide feedback.

Step 6 Prepare written response.

NOTE:	Ensure written response is in the appropriate format. See Task 9.2, Prepare Correspondence.

Step 7 Forward your response to your immediate supervisor or the MCCS Director for review and approval.

- Include a copy of the original request and any background data on the request for information.

NOTE:	Include PAO in the review/approve process depending on the content and level of detail provided, or if the request if for a major publication.

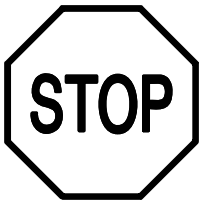
Step 8 Make changes to your response as directed, if any.

Step 9 Provide the information to the requestor.

NOTE:	Along with the information provided, submit a request for a courtesy copy of the report, paper, article, etc., in which the information you provided will be used.

Step 10 File the request and copies of all information you have provided in you own files.

- Include reports, papers, publications, clippings, etc., you receive from the requestor.
- See Task 10.6, Develop/Maintain a Press Clippings File.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.6

Develop/Maintain a Press Clippings File

DO THIS TASK WHEN

- You want to maintain a file of information articles, news releases, and ads that have been published about your Program's activities, events, products, services, features and benefits.
- You want to maintain a file of information articles, news releases, and ads of other programs, businesses, and agencies that relate to your Program's activities, events, products, services, features and benefits.
- You need a resource of examples from which to draft new information articles, news releases, and ads.
- You want to maintain a file of "good ideas" from the information articles, news releases, and ads of other programs, businesses, and agencies to try in your Program.
- You identify stories, information articles, news releases, and ads of interest to your Program's customers/patrons.
- You need to document your media campaigns/efforts.

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- MCO P1700.27 (series), MCCS Policy Manual.

SUPPLIES/ RESOURCES

- Public Affairs Office (PAO).
- MCCS Marketing Office.
- Current press clipping file.
- Archival files of stories, information articles, news releases, and ads.
- Transcript services.
- Press clipping services.
- Trade magazines.
- Newspapers.
- Copies of audio/video (A/V) stories, information articles, news releases, and ads.
- A list of MCCS and professional organizations and associations Internet web sites applicable to your Program.
- Photographs taken by staff or others that you have permission to use in stories, information articles, news releases, and ads.

THIS TASK IS DONE CORRECTLY WHEN

- The file is maintained with up-to-date information about your Program's activities, events, products, services, and the Program's features and benefits.
- The file is maintained with a variety of up-to-date media about your business and industry related information, stories, news releases, and ads.
- The file is used as a regular resource when developing information articles, press releases, advertising, and promotions about your Program's past, current, or proposed activities, events, products, services, features and benefits.

NOTES

The obvious goal of media coverage or media usage is "to get the word out". The first thing that comes to mind is using various media to *advertise* your Program's activities, events, products and services. And of course advertising *is* important to your Program.

But another, and often more powerful media tool that can significantly enhance your Program's image--that is, improve or change how you are perceived by your customers/patrons, is by publishing media pieces that report on your Program's *features* and *benefits*. Remember, permission must be granted by the author and/or publisher to quote and or use published (copyright protected) media pieces.

Articles, whether print, electronic, audio, or video, that connect your Program and staff to the community; to the true needs of your customers/patrons; and to the general viewer-/reader-ship can enhance your Program's image.

These type pieces relate to your readers/viewers what your Program/staff did for the environment; for society; for the community; or for health, fitness, safety, spirit, joy, etc. There may also be media pieces about one of your staff's selfless acts; about volunteerism, contributions, charity, kindnesses, bravery, etc. ....positive NEWS!

NOTES (cont.)

An effective press clippings file, in addition to being alert to seize these fleeting news/public relations (PR) opportunities, can significantly help your Program, the Department, and depending on the incident being reported, the Marine Corps.

And the good thing about news articles/press releases is that they are FREE. You get free advertising and promotion as well as an improvement/change in your image!

A complete and comprehensive press-clipping file contains digital or hardcopy versions of the following:

- Information articles, news releases, and ads published about your Program.
- Information articles, news releases, and ads published about other programs, businesses, and agencies that relate to your Program.
- Information articles and news releases written about you or your staff. (E.g., recognition for your MCCS, Program, and/or individual awards, successes, and accomplishments.)
- A chronology of events such as a construction project.
- Ideas and media methods that you can use to promote the Marine Corps, your Command, MCCS, and/or your Program.

The file should contain printed information, photos, A/V recordings, and transcripts from/about your:

- Program.
- Competitors.
- Industry.

Keep your files current and useful by reviewing and purging them periodically.

PROCEDURE

Step 1 Identify areas within your Program on which to maintain a press clippings file.

These may include:

- ☐ Your Program's activities, events, products, services and their features and benefits.
- ☐ Articles/ads about your Programs services such as trips, tours, rentals, etc.
- ☐ Your Program's special (not regularly scheduled/offered) activities, events, promotions, seasonal specials, etc.
- ☐ Special awards, prizes, certifications, and recognition given to customers/patrons or staff.
- ☐ Articles about national/local trends related to your Program.
- ☐ Articles/ads about coupon/discount programs/promotions, etc.
- ☐ Articles about Marine Corps/Command/Community QOL issues relative to your Program.
- ☐ Articles/information about Marine Corps/local funding issues affecting your Program and/or customers/patrons.
- ☐ Public service announcements (PSAs) that promote the **benefits** of Marine Corps Community Services (MCCS)--whether at your Command, in the community, or elsewhere in the Armed Services.

Step 2 Subscribe to publications and resources that have the potential to provide useful information or articles/advertisements to keep in your press-clipping file.

Consider the following:

- National newspapers.
- Local and base newspapers.
- Trade and professional magazines.
- Clipping bureaus (print and video).
- Activity calendars.
- Brochures/flyers from local chambers of commerce, municipal parks and recreation department programs, food, beverage and entertainment operations, child care and youth programs, other military MCCS Programs, etc.
- Commercial/professional media directories and sources.

NOTE:	In today's world of computers, you can use the Internet to locate media/ideas to promote MCCS and its benefits. See the professional organization/association sites such as IMCEA, NRPA, etc., relative to your Program.

Step 3 Determine if the publications/resources you currently receive/access provide information you consider useful and worth keeping in a press clippings file.

IF CURRENT PUBLICATIONS/RESOURCES:	THEN:
Consistently have articles, advertising, or information on programs that provide activities, events, products, services and benefits that are similar to yours.	1. Review (or ask a staff member to review) the articles and advertising. 2. Identify and mark all items that are relevant to your Program. 3. Look for references to other publications that may be similar and useful to you. 4. Budget for and subscribe to those publications. 5. Continue with Step 4.
Contains NO useful information.	Cancel the subscription.

Step 4 Review and save/file the items/articles identified in Step 3.

- ☐ Cut out, copy or print the information. Paste smaller items onto larger sheets of paper so they don't get lost.
- ☐ Make any notes that will remind you of how the clipping is pertinent to your Program.
- ☐ Date and initial the clipping.
- ☐ Categorize the clipping. (E.g., F&B, trips, fitness, benefits, public service announcements [PSA], special event, etc.)
- ☐ File for easy access. (Writing a short prompt on the outside of a file will assist when looking for specific clippings).
- ☐ File in the file system you have set up as a press-clipping system.

NOTE: Many of these may be accomplished digitally versus hardcopy.

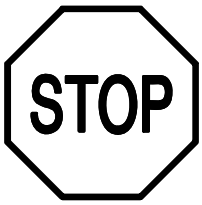
Step 5 Purge/update your digital and hardcopy press clipping files at least annually. (See Task 10.2, Prepare/Provide Public Information.)

☐ Note any that prompt you to initiate a media item.

☐ Determine:

- Continuing applicability.
- Timeliness/timelessness.
- Content.
- Policy change.
- Current political climate.
- Continuing general interest.

☐ Discard any that have no further value to your Program.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.7

Represent the Organization

DO THIS TASK WHEN

- You want to increase the visibility of your Program and MCCS.
- You have an opportunity to improve/change the image of MCCS and/or your Program.
- You want or need to influence decision makers.
- You want or need to provide information and/or make personal contacts (network).
- You have been assigned to (or initiated an opportunity to) represent MCCS by conducting a presentation, meeting, briefing to provide information to an individual, group, organization, or association.

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- MCCS Managers' Desk Reference, Vol 1., Task 1.7, Manage Meetings, Briefings and Presentations, Personal and Family Readiness Division (MRG).
- MCO P1700.27 (series), MCCS Policy Manual.

SUPPLIES/ RESOURCES

- Audio/visual (A/V) equipment and supplies.
- Computer hardware and software.
- Professional publications.
- Trade journals.
- Meeting/briefing agenda and notes.
- Display materials.
- Handouts and giveaways.
- Business cards.
- Communication Modules 1.1, 1.2 and 1.3 from the Leadership Skills for Managers (LSFM) course available from the Personal and Family Readiness Division (MRG).

THIS TASK IS DONE CORRECTLY WHEN

By effectively and professionally representing the organization, you have:

- Increased visibility of your Program.
- Positively influenced decision makers.
- Enhanced your personal relationships with your customers/patrons, key Command members, and/or community representatives.
- Enhanced the MCCS Program's relationship with Command, community groups, organizations, and associations.
- Positively and appropriately addressed the Command's/ MCCS's needs and interests.

NOTES

Requests for you to participate in or facilitate briefings, meetings, and presentations about Marine Corps Community Services (MCCS), the MCCS Program, or your Program may come from a variety of sources.

These may include:

- Personnel indoctrination coordinators.
- Private/special interest groups.
- Family Member Volunteers.
- Marine Corps Commands or units.
- Outside organizations and associations.

Any time you are interacting with your customers/patrons, you are representing the Command, the MCCS Program, and your Program.

What you say or provide will be construed as the "official position" of the Marine Corps, the Commanding Officer, and the MCCS Program. Always keep your immediate supervisor and the base Public Affairs Officer (PAO) aware of requests for you to represent the organization.

Briefings, meetings, and presentations are great opportunities to promote MCCS and/or your Program. Done well, they can influence people to make decisions that positively impact the MCCS Program and/or your Program.

Additionally, effective briefings, meetings, and presentations are a vital part of staff communication and team building. Often a briefing may be MCCS's and/or your first contact with a group. Effective briefings, meetings, presentations, and representing the organization are one of your important responsibilities.

NOTES (cont.)

Providing people with a simple giveaway such as a key chain, pen, button, candy, etc., anything with your MCCS logo on it, makes a lasting impression--they will remember you!

PROCEDURE

Step 1 Ensure you accurately and completely record the following information when you receive requests (or determine the need) to represent the organization in a briefing, meeting, or presentation.

- ☐ Name of the requestor. (Individual, organization, association, or group and the point of contact's phone/fax/e-mail address(es).)
- ☐ Desired date, time, and location of the briefing, meeting, or presentation.
- ☐ Purpose/focus of the briefing, meeting, or presentation.
- ☐ Desired outcome(s) of the briefing, meeting, or presentation with regard to the requestor, you, your Program, the MCCS Program, and the Command or higher authority.

NOTE:	Ensure you find out enough from the requestor to determine if the briefing, meeting, or presentation may venture into sensitive, security, private, or contentious areas.

- ☐ Description of your audience and the number that will attend the briefing, meeting, or presentation.
- ☐ Description of the facility where you will conduct the briefing, meeting, or presentation.
- ☐ Availability of A/V equipment at the location where you will conduct the briefing, meeting, or presentation.

Step 2 Discuss the request with your immediate supervisor.

- ☐ Provide your supervisor/manager the information you gathered in Step 1.
- ☐ Obtain his/her approval/disapproval.

NOTE:	Some requests may require review and approval by your chain of command.

Step 3 Take appropriate action based on the request review and decisions of your immediate supervisor and/or your chain of command.

IF THE REQUEST IS:	THEN:
Approved.	1. Notify the requestor that you or a designated MCCS/Marine Corps representative will be able to accommodate their request. 2. Continue with Step 4.
Disapproved.	1. Using your best customer service communication skills, notify the requestor that you will NOT be able to accommodate their request. 2. Explain why. 3. Take notes of the requestor's comments or alternative requests. 4. Whenever possible, help the requestor solve his/her need. 5. Stop here.

NOTE:	You may still be able to help the requestor if he/she is able to alter the focus/desired outcome of the initial request--don't just say, "No".

Step 4 Prepare your objective(s) for the briefing, meeting, or presentation.

To be successful, determine the following:

- ☐ The results the requestor expects from your briefing, meeting, or presentation.
- ☐ What you and/or the requestor want the audience to know, feel and or think.
- ☐ What do you expect from your audience following the briefing, meeting, or presentation.

NOTE:	Confirm with the requestor that you have captured the essence of their purpose and focus.

Step 5 Prepare briefing, meeting, or presentation notes.

Ensure your preparation includes the following:

- ☐ Objectives of the presentation.
- ☐ Audience benefits from attending the presentation.
- ☐ Possible audience objections to your presentation and how you will overcome the objections.
- ☐ Key points and supporting points. (Include the benefits you believe/ know your audience is seeking.)
- ☐ Any visuals you'll use. (E.g., diagrams, photos, charts, etc. Contact the Marketing Office for assistance.)
- ☐ Any giveaways you'll use. (E.g., key chains, pens, bottle water, air fresheners, pocket lights, etc., anything with your MCCS logo.)
- ☐ Your opening hook to grab the audience's attention.
- ☐ Your closing/summary that reminds the audience what they heard (or are going to do).

NOTE: Refer to the MCCS Managers' Desk Reference, Task 1.7, Manage Meetings, Briefings and Presentations for step-by-step procedures.

The medium is often the message. Plan and prepare your presentations well in advance of the delivery date. Work with your Marketing Department to ensure your visuals and presentation is effective and has impact. Outmoded media and poorly designed (or used) media can ruin "brilliant" content.

They can help also you prepare affective and attractive "canned" presentations to accomplish your recurring presentation responsibilities.

Step 6 Meet with your immediate supervisor or the MCCS Director to discuss and get the "okay" for your presentation plan and design.

Step 7 Make any adjustments or revisions as appropriate.

Step 8 Practice your presentation.

NOTE: The thought of public speaking makes many people nervous. To help make the experience a little less intimidating do the following:

- ☐ Practice your entire presentation from beginning to end as often as you can before the actual briefing date.
- ☐ Make your practice as realistic as possible.
- ☐ Recruit colleagues, staff, or family members to be your audience.
- ☐ Use short sentences and take deep breaths.
- ☐ Get feedback on your practices.
- ☐ Practice in front of a mirror when possible.

Step 9 Conduct your presentation.

Ensure you do the following:

- ☐ Arrive early and try to meet some of your audience members.
- ☐ Smile!
- ☐ Move a few steps toward the audience.
- ☐ Make natural hand gestures.
- ☐ Be clear, and change the volume, inflection, and pace of your voice.
- ☐ Pause... often.
- ☐ Maintain eye contact.
- ☐ Ask questions and give your audience time to ask you questions.
- ☐ Distribute “giveaways”.

Step 10 Evaluate your presentation to assess whether all required objectives (yours and the requestor's) were met.

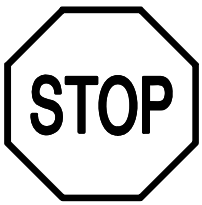
☐ Solicit feedback from the audience members on how the presentation went.

☐ Write a personal letter or note and/or call to solicit specific feedback about:

- Objectives met/not met.
- Any concerns.
- What went well with the group?
- Anything that you should do differently next time.
- Results or any actions to be taken as a result of the presentation.
- Provide feedback to your immediate supervisor on your presentation.
- Send a "Thank You" card or letter noting your appreciation for the opportunity, if appropriate.

NOTE:	You will probably be doing many briefings, meetings, or presentations in your career, so get as much feedback as you can to improve both your material and your presentation/speaking skills.

Step 11 File your presentation materials and any feedback you received.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.8

Advertise & Promote Effectively

DO THIS TASK WHEN

- You want to increase MCCS Program participation and/or sales.
- You are introducing a new MCCS Program activity, event, product, or service.
- You want to improve customer/patron knowledge and awareness about your Program.
- You are seeking Command and customer/patron support for MCCS.

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- MCO P1700.27 (series), MCCS Policy Manual.
- Advertising/marketing trade publications like:
  - "Advertising Age".
  - "Promotions Magazine".
  - "Guerilla" marketing books.

SUPPLIES/ RESOURCES

- Local needs survey data.
- Access to desk-top publishing system with capabilities for producing:
  - Fliers/posters.
  - Brochures/booklets.
  - Direct mail, post-cards, letters, "invitations".
- Internet and e-mail.
- Personal contact/mailing lists for outreach efforts.
- Display units/point-of-sale (POS) units.
- Poster/banner maker.
- Results of Task 10.10, Ensure Merchandising Effectiveness, and Task 10.11, Create and Maintain a Focused Program.

THIS TASK IS DONE CORRECTLY WHEN

- There is increased participation in your Program.
- There is a measurable and sustained increase in sales.
- New MCCS Program activities, events, products, and/or services are successfully launched.
- MCCS receives its fair share of available Command resources.
- The Command and your customers/patrons recognize and articulate the benefits of MCCS.

NOTES

Effective advertising and promotion must always start by identifying the *target market* and the *buyer motives*. Once you know these, you can proceed to make the five major decisions in developing an advertising program--known as the 5M's.

- Mission -- What are your advertising objectives?
- Money -- How much can be spent on advertising?
- Message -- What message are you trying to send?
- Media -- What media should you use?
- Measurement -- How will you evaluate the results?

Advertising is informing the marketplace (customers/patrons) of your Program's activities, events, products, and services. It answers the questions of who, what, when, where, why, how, and how much.

Promoting in basic terms, is taking the appropriate actions to "sell" the *values* and *benefits* of your Program's activities, events, products, and services. Promotion is the elements/ factors that you include in your Program planning and design that result in your activities, events, products, and services being perceived as valuable, unique, and exciting.

Promotions raise customer/patron awareness, interest, expectations, and cause them to speak positively about MCCS and your Program. For example, an "ad" in the base paper may list the days/hours of operation of the golf course. Whereas offering an "early-bird discount" to golfers, promotes one of the "values" of the golf Program.

In most cases advertising and promotion work together.

Advertising and promotion are considered the heart of any marketing campaign. These two actions are the points at which you "present" your Program's activities, events, products, and services to the marketplace.

NOTES (cont.)

Advertising and promotion are critical functions--they can make or break a Program. When done correctly a good advertising and promotion campaign can contribute to a "sell-out" of an event or activity, but done poorly (or not at all), even the best activities, events, products, and services will, at a minimum, cost your Program money, fail, and at the worst..., they vanish!

It doesn't matter if your Program is open only to a limited customer/patron base or is wide open to the local community, getting the word out helps ensure full participation. You spend considerable time and effort in planning for success, no less time and effort is needed to "sell" (advertise and promote) the activity/event.

In most cases the MCCS Marketing office will handle most of the advertising for you, but sometimes you may have to publicize/promote your own Program. In either case it is important that you plan as much lead-time as possible.

Three months for publicizing/promoting an activity/event is not unusual. If you have a history of activities/events that did not do as well as expected, review how long they were "advertised/promoted". As a society, we are conditioned to having "significant" advanced notice of activities or events. Think of how often you see previews and ads about a movie well before it is in the theaters. It takes a great deal of time and effort to prepare you, as a customer/patron, by getting you thinking about, talking about, and looking forward to seeing the movie. (...going to the play, game, concert, race, circus, carnival, vacation, etc.).

When planning your publicity, advertising, and promotions, remember that to your customer/patron, the Program's activities, events, products, or services are less important than the *values* and *benefits* (outcomes) of participating or purchasing.

NOTES (cont.)

For example, sell the outcomes of using your fitness center, rather than only advertising the details of the fitness center. (E.g., include added strength, better health, improved self-esteem, socialization, stress relief, etc., in your ads and announcements.)

Focus on the advantages and value of your Program's activities, events, products, and services. But remember to provide enough information to allow customers/patrons to make informed decisions about:

- What it is.
- When and where it is.
- How much it will cost (or not cost).
- Who it is for.
- How to get more information.

Apart from a few events that may be open to the general public, most MCCS activities, events, products, and services will be directed toward on-base customer/patron groups.

This presents some unique publicity/promotion challenges. Many bases do not offer in-house broadcast media (radio or television) and bases that do, have limited broadcast times.

This leaves you with printed media like base newspaper, MCCS publications, fliers, posters, the internet, direct mailings, banners, signs, plan-of-the-day/week, etc.

There are situations when the use of off-base media to publicize or promote your Program is permitted. But be sure to clear all off-base advertising with your Command's Public Affairs Office (PAO).

The **NAF Advertising Policy** permits MCCS advertising in civilian media for open-house events when the following requirements are met:

- Open to the general public.
- Not directly competing with similar events in the local civilian community.

NOTES (cont.)

- Event is infrequent. (Not weekly or monthly.)
- Increases military/civilian interaction.
- Enhances community relations.
- Only nonappropriated funds (NAF) are used.
- Resale activities will NOT advertise merchandise.
- Resale activities will NOT sell state-tax-free tobacco products and beverages except for ON-PREMISE consumption.
- The event/activity is coordinated with the PAO.

DoD and MCCS Policy on the **Commercial Advertising** in NAF produced media includes, but is not limited to the following:

- Advertising includes a disclaimer.
- Paid advertising on APF electronic media (Armed Forces Radio and Television Service, local Commanders'/CO's channels, etc.) is **NOT** permitted.
- Commanders/CO's make the final decision on acceptance of the advertising.
- The ads reach bona fide users.
- Media is restricted to on-base distribution.
- Legal and streamlined contracts/agreements are developed and used for placement of paid advertising in MCCS publications and advertising mediums.
- This type advertising is never considered commercial sponsorship and is not confused with it.

The following steps will help you advertise and promote your Program.

PROCEDURE

Step 1 Ensure the MCCS Program activities, events, products, or services that you are publicizing are ready for delivery.

☐ Ensure all parts of the detailed planning are complete.

☐ See Task 3.2, Prepare and Maintain Detailed Activity Plans.

NOTE:	This Task (and all of Duty 10.0, Promote Your MCCS Program,) assumes you are planning and providing *"customer-driven"* activities, events, products, and services. If you are unsure of your customers'/patrons' needs, wants, preferences, expectations, and priorities; or of current industry trends and fads; or what your competition is doing, see Duty 1.0, Tasks 1.1 through 1.5. You shouldn't spend your time advertising and promoting activities, events, products, or services that your customers/patrons aren't interested in or don't want!

Step 2 Complete an information sheet containing all the details of the activity, event, product, or service. (See Task 3.2, Prepare and Maintain Detailed Activity Plans.)

At a minimum, include the following:

☐ Promotional ideas/items.

☐ Where and at what times.

☐ Price/cost, even if free.

☐ Advertising budget.

☐ Restrictions.

☐ Duration.

☐ Value & benefits of participation.

☐ Primary and secondary target markets.

NOTE:	If your Marketing Office is coordinating the advertising and promotion effort, provide them this information.

Step 3 Identify the target market for this MCCS Program activity, event, product, or service.

Use the following sources:

- Computer survey data.
- Past surveys.
- After-action reports.
- Unit Personnel's active duty numbers
- Mailing lists.
- Attendance records.
- Membership lists.
- Personnel/HRO's numbers.

NOTE:	Your primary target market may be any one or a combination of selected customer/patron bases. (E.g., active duty, family members, retirees, reservists, DoD civilians, the general public, etc.)

Step 4 Select the best method to communicate with/reach the target market. (See Task 10.1, Identify Customer/Patron Communication Systems.)

Your selection may be one or a combination of the following:

☐ Printed media. (E.g., newspaper, fliers, posters, brochures, etc.)

☐ Electronic media. (E.g., Internet, e-mail, etc.)

☐ Direct mail.

☐ Broadcast media. (E.g., TV, radio, public address system, etc.)

☐ Group presentations and one-on-one briefs.

☐ Signage. (E.g., Banners, sign boards, sandwich boards, electronic message boards, letter boards, bulletin boards, marquees, etc.)

☐ Promotional ideas/items. (Themes, slogans, coupons, video/displays, mobile/outreach service, staff buttons/sales pitches, tie-in's with other MCCS Programs/on-base businesses, frequent user program, giveaways, T-shirts, pens, mugs, hats, calendars, balloons, mouse pads, bottles of water with custom MCCS labels, customized, them-oriented air fresheners, etc.)

NOTE:	Remember--the most effective advertising/promotion tool is a quality, customer service oriented program that encourages word-of-mouth advertising by the users. See Task 4.2, Ensure World Class Customer Service.

Step 5 Develop an advertising/promotion time line by beginning with the actual event date and working backwards.

Ask yourself the following questions:

- ☐ How long do you want the advertising to be "out there"?
- ☐ How long will it take to distribute, display, and/or broadcast the advertising?
- ☐ How long will it take to produce the advertising/promotion? Remember to include time for proofing, re-writes, local route, review/chop requirements, production times, interruptions, etc.

Step 6 Review the information sheet you developed in Step 2 and write the copy for the advertising. See Task 10.2, Prepare/Provide Public Information.

Ensure the following:

- ☐ Information is accurate and factual.
- ☐ Most important benefits are highlighted.
- ☐ The point of contact (POC) is included.

NOTE:	Provide all this information to the Marketing Department if they will be doing your advertising. Writing "copy" for an AD is usually conversational in tone and not necessarily "grammatically correct". In some cases, "copy" is intentionally incorrect using sentence fragments, double-meanings, colloquialisms, etc. Contact your Marketing department for assistance.

Step 7 Using all the information you have put together, create the "visual" portion(s) of any of your ads.

NOTE:	Because of the visual society in which we live, any images and designs you use in your advertising will have significant impact on your results. Your images and designs will either attract interest in whatever you are advertising/promoting, or NOT. Contact your Marketing department for assistance. If using radio, ask the professionals at the station to assist you in painting a mental picture. Remember most broadcast media ads only last about 30 seconds, so the picture must be memorable and concise.

Step 8 Stop here and proof everything.

Ask the following questions:

☐ Does the ad "sell/promote" the Program?

☐ Is the ad/promotion eye catching/appealing?

☐ Does the ad/promotion cause a positive impact and lasting impression?

☐ Does the ad/promotion provide sufficient information, but is not overwhelming?

☐ Are the facts correct? Is the message/information is accurate, complete, and timely.

☐ Is <u>every</u> word spelled correctly?

☐ Is the grammar correct?

☐ Is the ad/promotion politically/societally correct/appropriate?

NOTE:	Use others to assist you with this step.

Step 9 Ensure MCCS Marketing Department/Office sends all camera-ready copy and art to whomever will be preparing, producing, and distributing/ broadcasting the ad/promotion.

NOTE:	If the ads/promotional materials are edited/changed to meet time, size, or other requirements, repeat the "proofing" you did in Step 8.

Step 10 Implement the advertising/promotion per the time line you established and the media you selected.

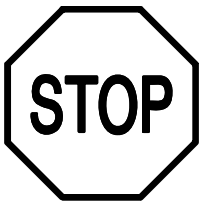
For example:

- Distribute fliers, posters, brochures, etc.
- Mail direct mail pieces.
- Broadcast the radio or television ads.
- Publish ads, articles, notices in newspapers.
- Send ads by internet web sites.
- Hang banners, place signage.

Step 11 Retain file copies of your advertising/promotions for future use and for evaluation purposes. (See Task 10.9, Evaluate Advertising/Promotion Effectiveness).

Step 12 Ensure all advertising material (banners, posters, fliers, etc.,) are retrieved following the advertised activity or event. Don't leave your expired ads/ promotions "out there"!

Step 13 Retain and store the advertising/promotional items that can be reused.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.9

Evaluate Advertising/Promotion Effectiveness

DO THIS TASK WHEN

- Advertising/promotional campaigns are completed.
- A long-term advertising/promotional campaign is under-way to determine if targeted results/goals are being achieved.
- There is a sudden downward change in participation or income.
- Customer/patron feedback indicates their lack of knowledge or awareness about your Program's activities, events, products, or services.

REFERENCES

- DoDI 1015.2 (series), Establishment, Management and Control of Non Appropriated Fund Instrumentalities, Encl 4, Advertising Policy.
- SECNAVINST 5720.44 (series), Department of the Navy Public Affairs Policy and Regulations.
- MCO P1700.27 (series), MCCS Policy Manual.

SUPPLIES/ RESOURCES

- Local assessment methods and data.
- Advertising and promotion campaign planning data/notes.
- Customer/patron participation counts.
- Customer/patron comment cards.
- Financial records. (E.g., P&L statements, etc.)

THIS TASK IS DONE CORRECTLY WHEN

- You are able to measure/assess the effectiveness of your advertising/promotion activities for your Program or for particular activities, events, products, or services.
- You are able to make decisions that improve the advertising/promotion of your Program's activities, events, products, and services.

NOTES

All marketing activities of conducting research, needs assessments, programming, publicizing, advertising, promoting, are done to identify and meet customer/patron needs and to maintain/increase participation, revenues, or both.

It is important to determine the impact and effectiveness of your marketing, publicity, advertising, and promotional efforts. Otherwise you may be wasting time, money, and effort.

Determining your marketing/promotion success and effectiveness is a relatively simple matter of measurements.

Prior to starting an advertising and promotion campaign you *should* have initiated customer/patron surveys, reviewed your Program's customer/patron counts, examined your financial information, and determined usage and sales figures to establish a baseline.

NOTES (cont.)

You will compare your baseline information to data collected after your advertising/promotional campaigns to determine the success (or lack thereof) of your advertising and/or promotions. These comparisons will help you decide if changes are needed in your advertising, promotion, or publicity methods, media, or messages.

In addition to measuring the "overall" or "general" impact, you should also measure the effect that the publicity, advertising, and/or promotions has on "specific" issues/ elements of your Program. (I.e., your activities, events, products, and services.)

This task applies to all three MWR Program categories: (Cat A, B, and C). Your fiduciary responsibility should cause you to consider the entire scope of your decisions and requests to advertise, promote, or publicize. Even if you don't have direct cost/expense from your budget, " getting the word out" has costs!

The equipment, supplies, materials, communication systems, and labor to advertise, promote, and publicize all cost the MCCS patrons and/or taxpayers. Therefore, your efforts should be examined and found efficient and effective!

This task is about assessing the efficiencies and effectiveness of your advertising, promotions, and publicity.

As you go about this task, keep it simple. Visualize all those consumer cards you have filled out to register new product warranties..., most of them ask the direct question, "How did you hear about us?" Be sure to ask the same of your customers/patrons.

PROCEDURE

NOTE:	Duty 1.0, Assess Needs (Tasks 1.1 through 1.5), and Duty 11.0 Evaluate Program/Activities/Events (Tasks 11.1 through 11.5) provide detailed guidance on collecting and analyzing needs and evaluating your Program and its activities, events, products, and services.

Step 1 Gather the following *"before advertising/promotion"* analysis resources.

☐ Local assessment data.

- Gather data that is focused on the activity, event, products, or services for which you are trying to determine advertising/ promotional effectiveness.
- This should be data points from **before** the advertising/promotional campaign.

☐ Advertising and promotion campaign planning detail sheets prepared in Task 10.8, Advertise and Promote Effectively.

☐ Customer/patron participation counts.

- This customer participation data should be from **before** the advertising/promotional campaign.

☐ Customer/Patron Comment Cards.

- These Customer/Patron Comment Cards should be from **before** the advertising/promotional campaign.

☐ Financial records/statements.

- These should be financial records from **before** the advertising/ promotional campaign.

Step 2 Prepare a baseline of information from which you will measure your advertising/promotion effectiveness.

This "before advertising/promotion" information will include, but is not limited to:

☐ Customer/patron counts:

- Ticket sales records.
- Usage/head count records.
- Reservations/attendance records.

☐ Revenue/sales information:

- Financial records.
- DARs.
- Financial statements.
- Budget records.

☐ Cost associated with advertising/promoting:

- Electronic media costs. (E.g., e-mail, internet, broadcast, etc.)
- Print media costs.
- Tele-marketing costs.
- Distribution/mailing costs.
- Labor costs.
- Prizes/promotions/giveaways costs.
- Discounts/complimentary coupon costs.

☐ Customer/patron awareness/knowledge about an upcoming activity/ event:

- Local Needs Assessment survey results.
- Personal interviews/surveys and focus groups.
- Comment cards/surveys.

Step 3 Gather the following *"after advertising/promotion"* analysis resources.

☐ Local assessment data.

- This data must be focused on the advertising, publicity and promotions of the activity, event, products, or services for which you are trying to determine advertising/promotional effectiveness. ***(Remember to ask, "How did you find out about this...?" and…, how do you rank the following media in order of importance for successfully getting the word out?)***

- This should be data points from **after** the advertising/ promotional campaign.

☐ Advertising and promotion campaign planning detail sheets prepared in Task 10.8, Advertise and Promote Effectively.

☐ Customer/patron participation counts.

- This data should be from **after** the advertising/promotional campaign.

☐ Customer/Patron Comment Cards.

- These should be from **after** the advertising/promotional campaign.

☐ Financial records/statements.

- These should be from **after** the advertising/promotional campaign.

Step 4 Compare the baseline information prepared in Step 2 with the *"after advertising/promotion"* data gathered in Step 3.

Look for increases, decreases, or changes in the following:

- ☐ Customer/patron counts.
- ☐ Revenues/sales.
- ☐ Customer/patron awareness/knowledge.

NOTE: Be alert to variables that may have affected the results of these comparisons. You may have enjoyed gains or suffered losses that had nothing to do with your publicity, advertising and promotions.

For instance, there may have been uncontrollable increases in labor costs, cost of materials, changes in base loading, unexpected discounts, poor or exceptional weather, customer/patron shifts due to a competitor loss, etc.

Factor all variables when assessing the effectiveness of your publicity, advertising, or promotions.

Your surest data points are going to be those that directly asked and then indicated that the customer/patron changed his/her behavior (made different choices) as a direct result of your publicity, advertising, or promotions.

Remember that you can ask these "specific" and "open-ended" type questions using survey software.

Step 5 Evaluate the increases, decreases, or changes in the data collected in Step 4.

NOTE: This information can be collected by survey software, questionnaires, surveys, comment cards, focus groups, and personal interviews.

See Task 3.2, Prepare and Maintain Detailed Activity/Event Plans, which contains information about customer/patron counts/attendance, revenue projections, program goals and objectives, and customer/patron behavioral changes.

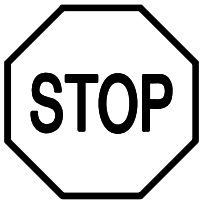
Step 6 Calculate the cost of your advertising/promotions as a percentage of total revenue and/or cost per customer/patron.

IF CALCULATING:	THEN:
Cost of advertising/promotion per customer/patron.	Divide the total cost of advertising/ promotion (A/P) by the number of participants. **Example:** $250 (A/P ÷ 400 participants = $0.63 per participant.
Cost of advertising/promotion as a percentage of activity/event revenue.	Divide the cost of advertising/promotion (A/P) by the revenue received and multiply by 100. **Example:** $150 (A/P ÷ 4500 total revenue = .03333 x 100 = 3.3%

NOTE: See Task 5.4, Analyze Financial Statements, for additional information on computing these cost/revenue percentages, determining variance, and analyzing your financial data.

Step 7 Evaluate your advertising/promotion costs.

IS YOUR ADVERTISING/ PROMOTION COSTS?		THEN:
In line with your budget projections.	YES.	1. Continue your advertising/promotions. 2. Positively reward and reinforce everyone involved in your advertising/promotions.
	NO.	1. Justify the variance. 2. Make applicable adjustments to the A/P budget line. **- AND/OR -** 3. Make adjustments to the applicable detailed activity plan. **- AND/OR -** 4. Make adjustments to the advertising campaign details. 5. Keep your immediate supervisor informed.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.10

Ensure Merchandising Effectiveness

DO THIS TASK WHEN

- Establishing a new resale program and/or updating your current resale program/program plans.
- Trying to increase sales in your resale program.
- Planning a holiday or seasonal sales program.
- Planning a sales program to turn over slow moving or out-of-season merchandise.
- Planning a promotional sales program that features a specific line/brand of merchandise.
- You are moving your sales items around your shop/store or changing sales area designs/layouts/arrangements to keep your customers interested, curious, and looking for new items.
- Setting up your display areas to increase interest in your Program and its benefits.

REFERENCES

- MCCS Softlines Merchandising Course.
- Maximizing Golf Shop Profits Workshop©, Kathy Talbot Denton, E.T.C. (Education, Training, and Consulting), Inc., San Antonio, TX, 1995.
- Video and reference, Building A Winning Retail Strategy, Ryerson Polytechnic University, Toronto, Canada, 1997.
- Video and reference, Maximizing Store Impact, Ryerson Polytechnic University, Toronto, Canada, 1997.

SUPPLIES/ RESOURCES

- Inventory list of all sales stock on hand and on order.
- Inventory list of all sales and merchandising tools, signs, cabinets, props, frames, shelving, islands, supplies, etc.
- Usage data such as sales by category/department.
- Layout (drawings/sketches/floor plans, etc.) of your shop including vendor Plan-O-Grams.
- Props, equipment, fixtures, supplies, furniture, and decorator items for theme layouts and sales events.
- Books, videos, photos, drawings, publications and brochures about interior designs for businesses.
- Books, videos, photos, drawings, publications and brochures containing merchandising equipment, fixtures, and supplies.

SUPPLIES/ RESOURCES

- Typical office supplies.
- Computer with floor-planning, computer-assisted-design (CAD), spreadsheet, and word processing software.
- Simple drafting/drawing supplies including a tri-scale ruler, straight edge, drafting triangle, pencils, graph paper, compass, and drafting templates.
- Names of design consultants and merchandising display and supplies companies. (Talk with the MCCS Marketing Department/Office/Program.)

THIS TASK IS DONE CORRECTLY WHEN

- You prepare and execute a Merchandising Plan that includes:
  - An organization of related sales items/groupings by product categories.
  - A determination of the location of each sales item/ grouping.
  - An estimation of the amount of space needed for each sales item/grouping.
  - A layout of your sales space(s) and shop.
  - A layout of each of your sales items/groupings showing the amount of space, location and display of each.
- You prepare and execute an annual Sales Plan that includes:
  - Holiday or seasonal sales programs.
  - Periodic “sales” to turn over slow moving and/or out-of-season merchandise.

THIS TASK IS DONE CORRECTLY WHEN (cont.)

- Periodic sales "promotions" featuring and offering specific lines or brands of merchandise.
- Sales promotions/presentations/displays for special themes and holidays.

• You are constantly moving and changing your merchandise, fixtures, decorations, signage, displays, highlights, props, and displays to keep your customers curious, interested, and looking for new items in your shop or sales area.

NOTES

When you started in MCCS, did you ever imagine that, in addition to being able to "manage" your Program, you would also need expertise in merchandising?

This task is primarily for managers of MCCS Programs that include a pro shop or other resale operation. (E.g., golf, bowling, outdoor recreation, arts and crafts/auto skills, aquatics, fitness, marina, etc.) *The steps in this task also work for the visual display of the rental equipment, checkout equipment, and other services offered by all MCCS Programs.*

Merchandising is the technique of displaying and promoting:

- the right *products*.
- at the right *place*.
- in the right *quantities.*
- at the right *price.*
- at the right *time.*
- under the right *conditions.*

This task deals with the actual visual display of merchandise and the supporting decor, fixtures, decorations, signage, displays, equipment, supplies, props, music/sound, lighting and furniture.

NOTES (cont.)

Other *merchandising related* Duties/Tasks in your MCCS Managers' Desk Reference include:

- Identifying and selecting the right products.
  - Duty 1.0, Assess Needs.
  - Duty 11.0, Evaluate Program/Activities/Events.
- Pricing competitively and achieving an acceptable return on investment (ROI).
  - Task 5.5, Evaluate Current Fees, Prices, and Charges.
- Ensuring appropriate quantities, styles, sizes.
  - Duty 7.0, Manage Supplies and Equipment which includes tasks about MCCS Program supplies, buying resale merchandise, services, equipment, property, security, and controlling shrinkage.
  - Duty 12.0, Manage Food and Beverage Operations.
- Ensuring you project a positive Program image.
  - Task 10.11, Create and Maintain a Focused Program Image.
- Knowing what your competitors have, what they do, where they are located, who they serve, what they offer, how they buy, stock, advertise, merchandise and price, when they operate, and how they look (image).
  - Task 2.1, Assess Competition.
  - Task 10.11, Create and Maintain a Focused Program Image.

NOTES (cont.)

- Providing attractive, up-to-date, safe facilities, grounds, equipment, supplies, and vehicles.
  - Duty 8.0, Manage the Physical Plant.
  - Task 3.5, Ensure Safe Program Environment.
- Offering appropriate, entertaining, and safe activities, events, products, and services.
  - Task 3.1, Prepare and Maintain Program Activity Calendars.
  - Task 3.2, Prepare and Maintain Detailed Activity/ Event Plans.
  - Task 3.5, Ensure Safe Program Environment.
- Advertising and promoting your Program's activities, events, products, services and the values and benefits of your Program.
  - Duty 10.0, Promote Your MCCS Program.

One of your important management skills is the selection of appropriate and applicable products and services of the right types, sizes, colors, patterns, models, with the right features, in sufficient (yet not excessive) quantities, and, with regard to "trends" and "fads".

Trends are core to your Program. Besides input from your customers/patrons and your operational and financial information, industry trend information shows you where to direct your Program. But remember, your customers expect you to stay atop of and offer the latest "fads" in your Program.

NOTES (cont.)

Prior to investing in fads, you need to identify its worth. Task 1.4, Analyze Data/Draft Needs List (Conduct R.A.W. Tests) will help you do this. When a fad has the potential for a positive ROI, featuring these type resale products can be an opportunity to make a quick and sometimes significant financial return while meeting and often exceeding your customers'/patrons' expectations. Appropriate research will help you avoid *red herrings*.

The challenge in your buying/stocking, sales planning, promotions, and merchandising is to appeal to, attract, and retain customers who have "at least" these following diverse characteristics:

- Differing tastes and interests.
- Differing cultural backgrounds.
- Varied ages--children of all ages to senior citizens.
- Built-in entitlement beliefs.
- Widely varying interests and needs.
- Different budgets and spending attitudes/beliefs.
- Enormous buying choices and opportunities.
- Frequent relocation requirements due to military transfers.

While accomplishing **effective** buying/stocking, sales planning, promotions, and merchandising may sound nearly impossible, these are among your many core business responsibilities. They will help you attract customers away from your competitors and gain loyalty.

By properly advertising, promoting, and attractively and effectively displaying up-to-date, quality products and services, you earn your customers'/patrons' confidence.

NOTES (cont.)

Your Program's image (how you look to, and are remembered by, your customers) is created, in part, by having the following:

- Professional and committed staff.
- Customer service systems that achieve extraordinary customer service results.
- Attractive, well-maintained facilities and grounds.
- Quality and appropriate activities, events, products, services, equipment, machinery, supplies, and vehicles.
- An effective marketing program.
- A reputation for value pricing.
- Effective marketing that includes:
  - Customer research.
  - Advertising.
  - Promotion.
  - Publicity.
  - Public relations.
- Professional merchandising.

(See Task 4.2, Ensure Extraordinary Customer Service.)

As you consider, review, develop, or alter your merchandising plans, keep this in mind: In the U.S., the majority of purchasing decisions are made by women. Use this fact in your data gathering as well as in your merchandising choices, designs, initiatives, and set-ups.

Your efforts to ensure merchandising effectiveness will be enhanced by working with professionals in your MCCS marketing department, the Marine Corps Exchange's visual merchandising staff, your vendors'/contractors' in-house design services, managers like yourself in your professional network, and with consultants who specialize in business imaging, merchandising, and in interior design/decoration for shops/ stores/businesses, etc.

NOTES (cont.)

While you may never have prepared written merchandising plans or sales area/department floor plans, this task will suggest easy ways to avoid a lot of back-breaking, trial-and-error labor and spending your decorating/merchandising/ promotional budget with less than terrific results.

You don't need special drafting skills to accomplish this Task. Steps 3 - 20 describe the simple procedures for quickly drafting your floor plan(s) and illustrating the fixed features currently found in your sales areas.

The trick is doing this quickly and creatively vice pains-takingly and ultra-precisely. You will find you can use your floor plans for lots of things beyond planning your merchandising areas. You can use them for maintenance plans, security planning, traffic flow planning, utility (e.g., electricity, lighting, HVAC, plumbing) location information, etc.

Before starting this task, determine if these drawings or blue prints are already available in Base/MCCS Maintenance, MCCS Facilities or contact the Headquarters (MR) Construction Branch.

PROCEDURE

Step 1 Unless you are specially trained, gather some merchandising information and experiences BEFORE starting this task. (This Step will save you time!)

Accomplish as many of the following as you feel necessary to tackle developing a merchandising plan for your Program:

☐ Examine the merchandising methods and strategies of local business establishments. Look at both competitors and non-competitors.

- Review the steps in the task so you will recognize the methods and concepts while visiting other stores.
- Take one or several colleagues or staff members out to visit local business establishments to identify various merchandising strategies.
- Visit businesses that do exactly the same thing and those that provide the same "type" products or services but are in a different type business than you. (E.g., If you manage a golf pro shop, look at some local golf pro shops, but also look at sports stores, athletic specialty stores, clothing stores, general merchandise stores, department stores, etc.)

☐ Figure out (ask) why the store chooses to carry particular brands/lines/models, why the departments are where they are, and why the products are arranged as they are. (Be careful, don't wear out your welcome.)

☐ Take notes and pictures, if it's okay to do so.

☐ If available, obtain floor plans, drawings, etc.

☐ Find out who supplies the store's merchandising equipment and supplies.

☐ Note how the colors, textures, lighting, signage, decorations, music, etc., set a tone, guide you through the store, and how it makes you feel (image). Are you at ease, impressed, intimidated, confused, turned on/off..., why?

☐ Review books, videos, photos, drawings, publications and brochures about interior designs for businesses, and merchandising equipment, fixtures, and supplies.

☐ Talk about merchandising with the Marine Corps Exchange merchandising specialists and your vendors, suppliers, contractors, and your professional colleagues and peers who have experience in this area.

☐ Talk with the MCCS Facilities staff, Headquarters (MR), your Program Manager, and staff at MCCS Marketing Division/Branch.

Step 2 Now that you've looked around other businesses, use the following points to examine your Program.

First Impressions:

- ☐ Is the signage effective?
- ☐ Is the entrance welcoming?
- ☐ If you have windows, are the displays appealing?

Store Layout:

- ☐ Can customers get into the shop easily?
- ☐ Do you have aisle structure?
- ☐ Are all areas of the shop easily accessible?

Presentation:

- ☐ Do you have your best products in the best locations of your shop?
- ☐ Is your merchandise presented so it is easy to shop?
- ☐ Do your presentations encourage impulse buying?

Signage:

- ☐ Are your signs neat and consistent?
- ☐ Do your signs help your customers find their way around the shop?
- ☐ Do your signs provide information to help customers buy?
- ☐ Is all the merchandise properly marked with price tags?

Displays:

- ☐ Do you have exciting in-shop displays?
- ☐ Are your displays themed?
- ☐ Do your displays encourage customers to examine the merchandise?
- ☐ Are your displays fully stocked?

Events:

- ☐ Does your shop provide any entertainment value?
- ☐ Do you/staff demonstrate how products can be used?
- ☐ Does your shop encourage your customers to become involved with the products?

Cleanliness/Sanitation:

- ☐ Are your displays, props, fixtures, racks, and shelves clean?
- ☐ Are your glass cabinets, doors, and mirrors clean?
- ☐ Are floors clean?
- ☐ Are rest rooms, locker rooms, changing rooms, etc., clean and stocked?
- ☐ Is your merchandise clean and neat?

If all YES answers, congratulations. Stop here. If in doubt, continue.

Step 3 Gather the materials that you will need to accomplish this task.

These materials will include:

☐ Basic drafting/drawing supplies including:

- Tri-scale ruler.
- Straight edge.
- Drafting triangle.
- Pencils and erasers.
- Graph paper.
- Compass.
- Drafting templates, etc.

-OR-

- A computer with easy-to-use software that will assist you in drafting floor plans and merchandise layouts.

-OR-

- A floor planning/design kit for commercial applications.

☐ Copies of existing floor plans/plan-o-grams of the current layout of your shop's/store's sales areas, and/or sketches/layouts of each of your resale item groupings/departments.

☐ Inventory list of all sales stock on hand and on order.

☐ Inventory list of your sales and merchandising tools, signs, racks, cabinets, props, frames, shelving, islands, supplies, etc.

☐ Books, videos, photos, drawings, publications and brochures containing illustrations and dimensions of merchandising equipment, fixtures, and supplies.

☐ Books, videos, photos, drawings, publications and brochures about interior designs for businesses.

☐ Typical office supplies. (E.g., tape measure, scissors, Post-Its®, Scotch Magic Tape®, stapler, file folders, etc.)

☐ If available, floor plans, drawings, etc., from other "good" pro shops/sales areas.

Step 4 Identify your "low-traffic" times so you know the best time to measure the dimensions of your shop, merchandising supplies, props, furniture, equipment, etc.

NOTE: If your Program traffic is high during all hours of operation, you may have to accomplish this task before or after your regular hours of operation, or at a time when your Program is normally closed.

Ensure you have staff members available to help you measure, rearrange, move things, try out ideas, brainstorm, etc.

Accomplishing this during low-traffic periods will:

- Minimize customer interruptions/inconveniences.
- Shorten the time it takes to do this task.

Step 5 Identify each area where you currently display your resale merchandise, rental/check-out equipment, or service information.

NOTE: These may include a single room, several rooms, entry-ways, atriums, hallways, display windows/boxes, or perhaps something as simple as one or two display cabinets, a single under-counter area, or just a counter-top display.

Whatever the size, number, and dimensions of your display areas, be sure you are aware of each.

Step 6 Determine if you have other areas where you could better display your resale, rental, checkout merchandise, or services information.

NOTE: Take the time now, before measuring, drawing, rearranging counters and shelving, decorating, or moving stock, to decide if your current shop or display spaces are the best possible use of your overall facility. Don't let your imagination be handicapped by, "that's how we've always done it" thinking.

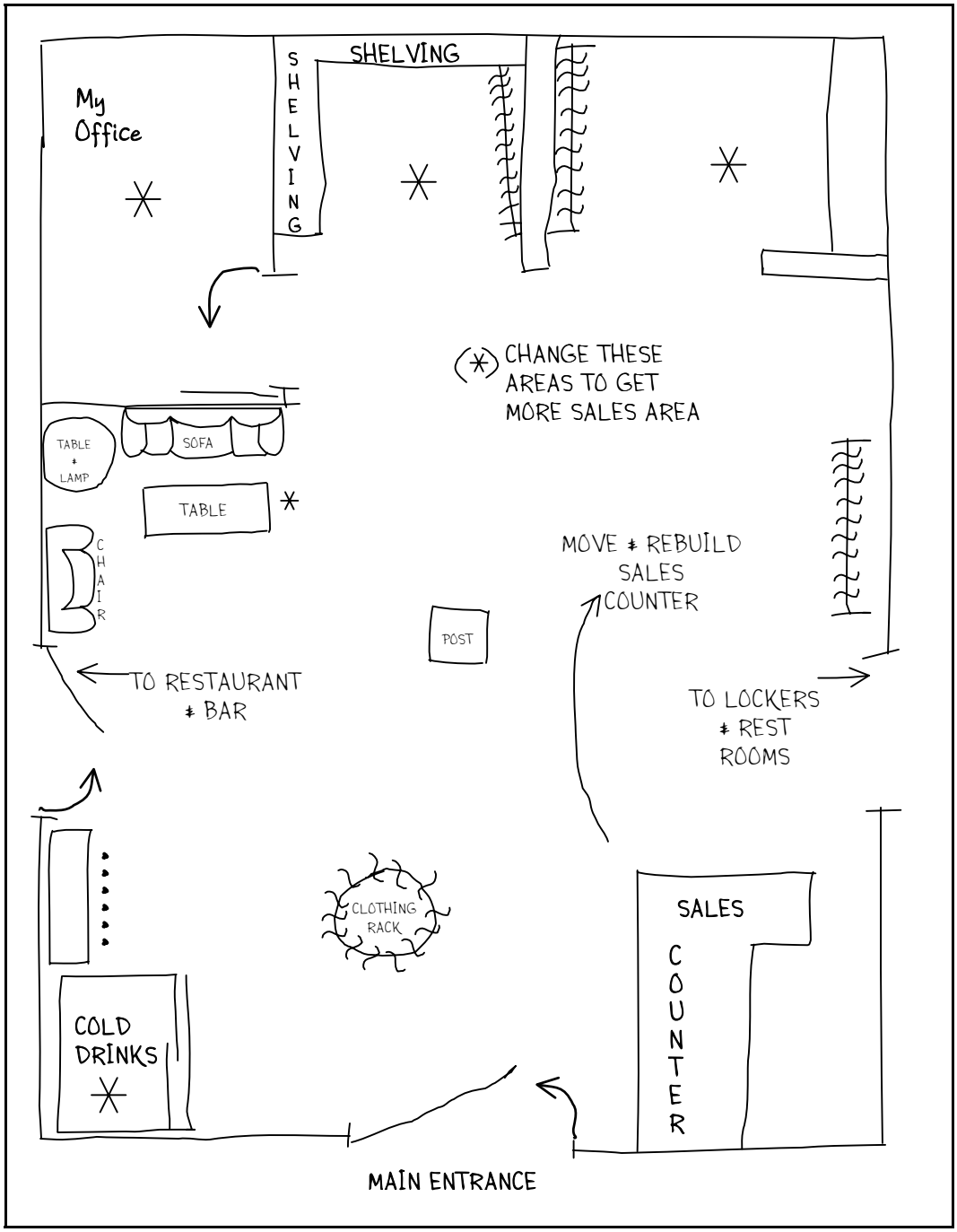
Look at your overall facility. Don't just think about how you've always seen it, but really look at it! Don't see it as it is, but rather, look for its potential.

Without getting into a major facility renovation or new construction, are there areas where you could better display your products and services?

IF:	THEN:
Your merchandising areas and/or furniture and equipment are in the best or only possible location within your facility.	Continue with the next Step.
You have the potential to significantly improve your merchandising/display area/environment.	1. Talk with the MCCS Headquarters (MR), and your Program Manager at the MCCS Division/Branch. 2. Begin the renovation, repair, new construction processes per local and MR policy. 3. Delay immediate expenditures and efforts on new merchandising equipment, supplies, props, furniture, etc., until your recommended renovation, construction, or repair is completed. 4. Continue with the next Step.

Step 7 Make a very basic sketch of your resale shop floor plan on scratch paper.

Example:

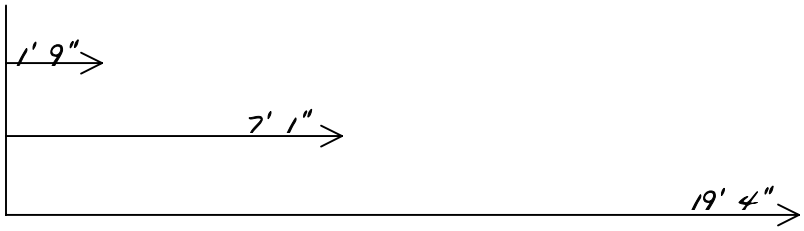


Step 8 Measure the essential and fixed features of your resale shop.

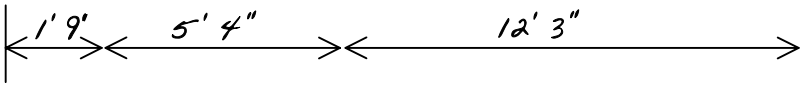
- All entrance(s) and emergency exits.
- All doorways: (e.g., office, maintenance shop, dressing room(s), bathrooms, showers, locker rooms, closets, utility accesses, etc.).
- All windows: (e.g., Main display windows or front windows/window boxes/cabinets, side windows, observation windows, if any).
- Fixed columns, posts, dividers, partitions, etc.
- All fixed equipment, cabinets, shelving, etc.
- All merchandise areas.
- Aisles.
- Check-out counter.

NOTE: Use a base-line measuring system vice an accumulative one. You will have fewer errors in your floor plan. Measure each dimension along a wall from the same start point on the wall.

Baseline method:

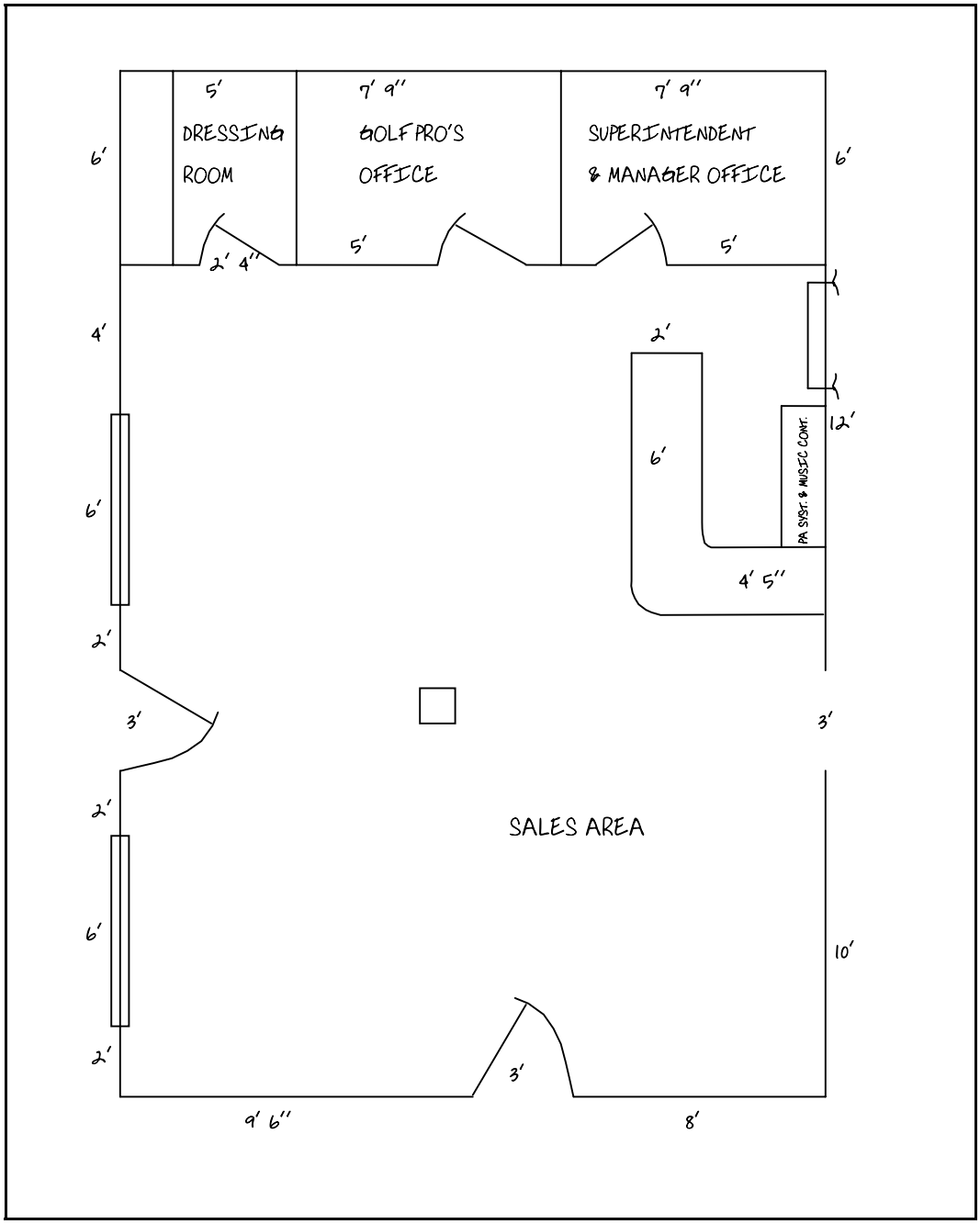


Accumulative method:



Step 9 Record your room and feature measurements onto your "basic" sketch of your shop's/store's floor plan from Step 7.

Example:



Step 10 Using your measurements and "basic" sketch of your shop, draft, **in pencil**, a "to-scale" floor plan of your shop's/store's sales area(s).

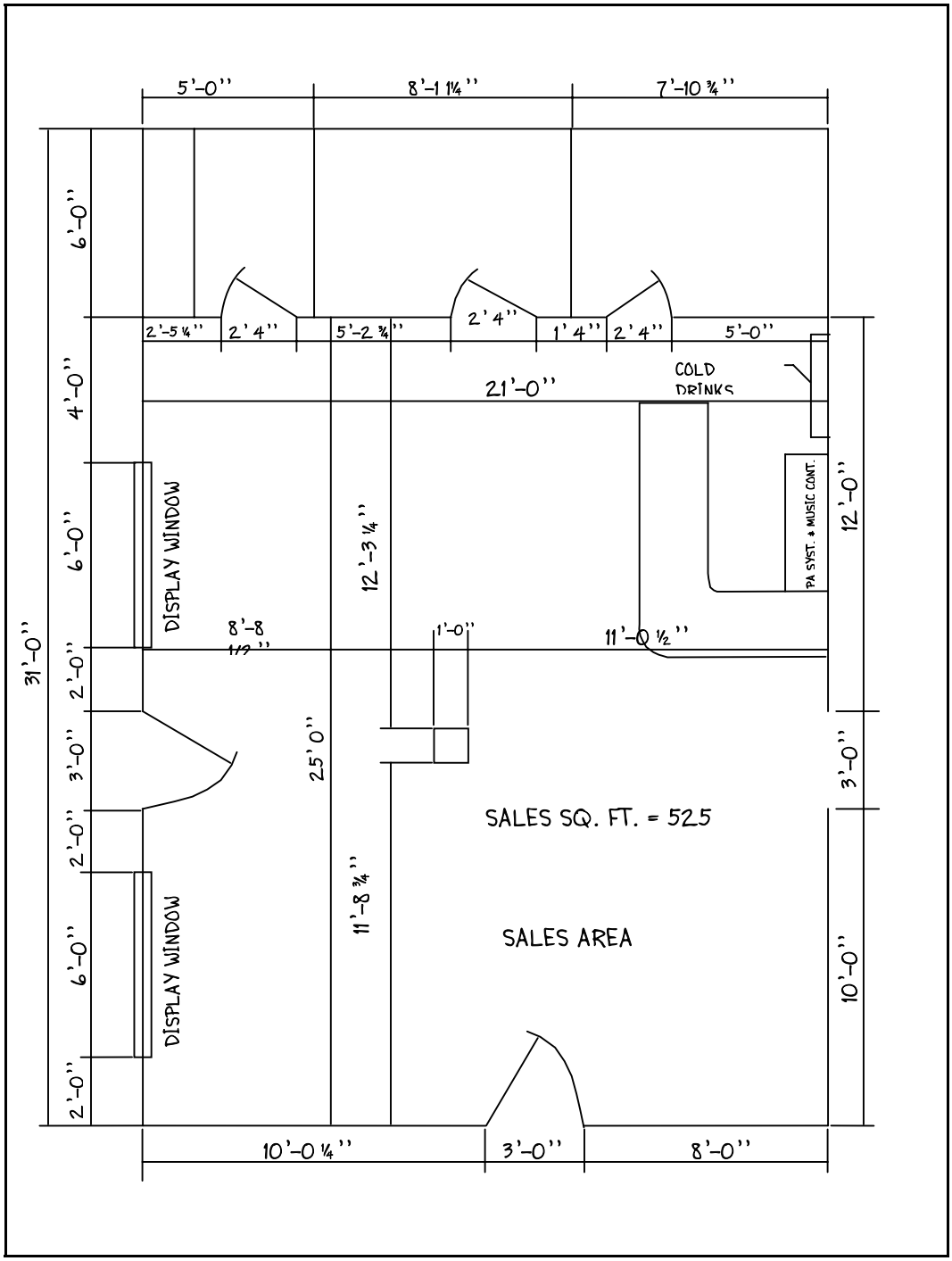
Ensure your sales area floor plan(s) includes the following structural/ environmental elements:

- ☐ Main entrance(s) and emergency exits.
- ☐ Main display windows (or front windows/window boxes/cabinets).
- ☐ Side windows.
- ☐ Office entryway.
- ☐ Supply/storage entryway.
- ☐ Entry to maintenance shop, if applicable.
- ☐ Dressing room(s).
- ☐ Entries to other areas of your facilities, if connected to shop or sales area. (E.g., locker areas, lounges, showers, and bathrooms, etc.)
- ☐ Observation windows, if any.
- ☐ Fixed columns, posts, dividers, partitions, etc.
- ☐ All fixed equipment, cabinets, shelving, etc.
- ☐ All merchandise areas including aisles.
- ☐ Check-out counter(s).

NOTE:	Your initial floor plan drawing should represent your shop or sales area showing the physical features you can't move without renovating, reconstructing, or repairing the facility/area.

See example on next page:

Step 10 (cont.) **Example:**



Step 11 Confirm that your "to-scale" floor plan contains all the "fixed" (unmovable) features that are in your shop's/store's sales area.

☐ Make corrections as applicable.

Step 12 Confirm the accuracy of all measurements represented in your "to-scale" floor plan.

☐ Make corrections as applicable.

Step 13 Finalize the floor plan by "inking" over your pencil draft.

NOTE:	This draft and redraft, and ink over, as well as the eventual inclusion of your merchandising elements are made much easier with the use of floor planning software and/or a floor planning "kit". The graph paper in these "kits" typically has a write-on/wipe-off, laminated surface over the graph/grid. After locating your store's walls and fixed features on the laminated surface with the provided adhesive marking tape, you then place your sales floor equipment, designs, tables, racks, furniture, shelving, etc., on the floor plan using the kit's to-scale, die-cut, vinyl cut-outs.

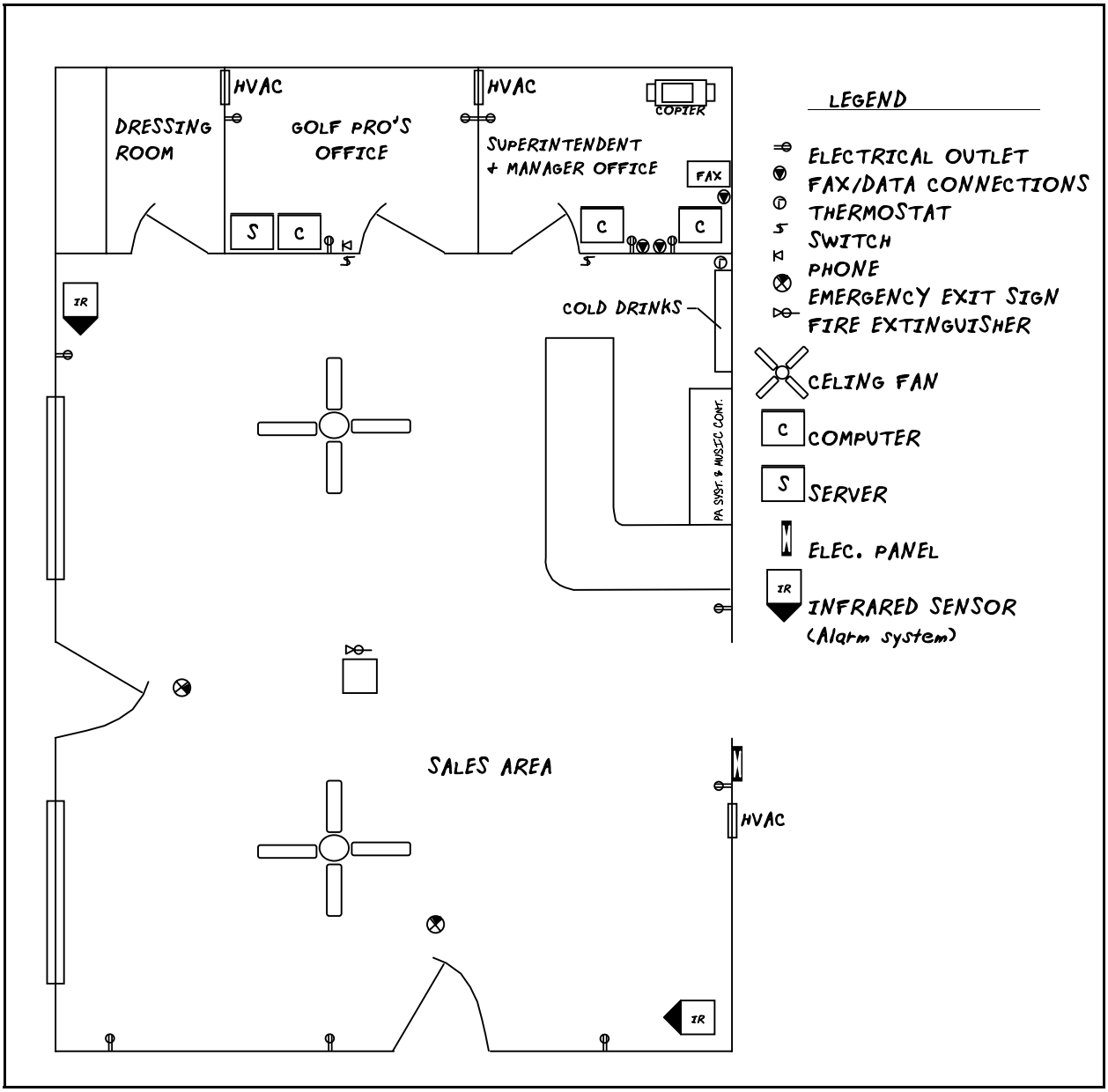
Step 14 Make 10-15 "working" copies of your finalized, "to-scale" floor plan showing ONLY your shop's/store's "fixed" features.

NOTE:	You will be able to use these to illustrate the locations of various utility and operational systems which are useful for maintenance, safety, security, operational, and traffic pattern planning applications. You can also use copies to "plan" various merchandising schemes and seasonal promotions before beginning a major relocation of the actual physical items in your shop. This <u>will</u> save you time in the long run!

Step 15 File your "master" floor plan in a protective folder and store it where it will not become damaged.

Step 16 Indicate the location of the following items on one "copy" of your floor plan.

- Electrical receptacles.
- HVAC returns and outlets.
- Lighting controls.
- Fans.
- Junction boxes.
- Security/alarm controls.
- File server.
- Copier.
- Utility/communication closets, etc.
- Telephones.
- Security cameras.
- Lighting fixtures.
- Wiring trunks.
- Fire extinguishers.
- Computer terminals.
- Fax machine.
- Refrigeration units.
- Safe



Step 17 Repeat Steps 7 through 16 for each of your sales areas.

- Also consider your maintenance/outfitting shop if you do/could/should use this area to merchandise your products and services. (E.g., golf and bowling's equipment rigging, sizing, drilling, repair shop.)

NOTE:	If your customers are permitted entry into these areas to meet their rental/purchase/check-out needs, then this may be an area in which you could merchandise some of your products. If your customers are traditionally restricted from these areas, rethink the "tradition". Ask yourself why this space could/should not be used to "expand" your shop or sales areas.

Step 18 Review your inventory list of the equipment and supplies you currently own and use to display your merchandise to remind you of your merchandising equipment and supplies options. **(See list of merchandising fixtures/ supplies/displays on page 10.10.39.)**

IF:	THEN:
You do **NOT** have a list of your merchandising equipment.	Prepare one.
You have a list that is **NOT** up-to-date.	Add, change, or delete items on your inventory as applicable.

Step 19 Measure the dimensions of each of your non-fixed merchandise display items.

NOTE:	These include your cabinets, tables, shelving, islands, racks, T-bars, ring racks, mannequins, frames, props, signs, supplies, etc. Measure the length, width, and height dimensions of each of these merchandising items and record the dimensions on your inventory of merchandising supplies and equipment. You will use these dimensions to prepare "to-scale" layouts. Once measured and recorded, you will not have to repeat this step.

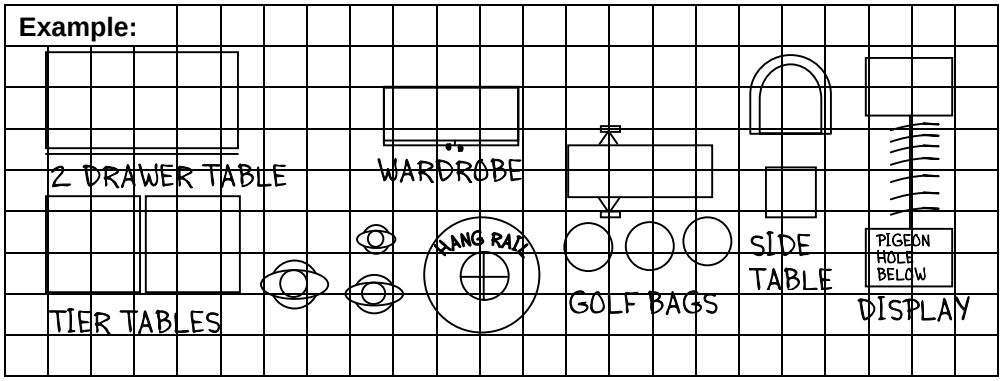
Step 20 Draft each merchandising item you measured in Step 19 onto graph paper that has same scale you used to draft shop's/store's sales area floor plan.

- ☐ Label each illustration inside or beside the item's borders so that you know which items the illustration represents.
- ☐ Cut these out and save in an envelope. Store with the copies of your store's floor plans. You will use these to visualize various merchandising arrangements.
- ☐ Ensure you have an illustration cut-out for each of your merchandising devices. (See example below NOTE.)

NOTE: These steps are less tedious if you use any of the following:

- Software designed to layout business floor plans and to locate typical "business" furniture. An added advantage of these programs is that some of them can provide 3-dimensional representations of your space(s). And some of the programs will allow you to "experiment" with color and design schemes, other than just the location of items on the floor.
- Design "kits" that use to-scale, laminated floor plan bases and to-scale, die-cut symbols representing traditional business/ merchandising furniture.
- Professional design and merchandising consultants including those in the various MCCS Program Offices and Headquarters (MR).

Example:



Step 21 Use the following industry merchandising guidelines when preparing your merchandising layouts and plans.

- Use recessed, adjustable eye-ball, and/or track lighting and natural lighting. Avoid fluorescent lighting and the resultant "discount store look".

- Use light colors and smooth and/or soft textures to enhance the feel and perception of spaciousness, especially if your shop is small.

- Use darker, richer tones and textures if your shop or sales areas are larger. Either way, ensure your colors and image match. (See Task 10.11.)

- Provide background, easy listening music. This music is for the customer. It is "impression" music and should match your theme/image. Don't let your staff select "contemporary/favorite" music types or radio stations. Your merchandising area is a sales/business location..., <u>not a staff recreation area</u>.

- Select appropriate, easy-listening music to align with holiday and seasonal events.

- Ensure your sales/check-out counter is located in the most efficient/ effective site in your shop. While not "traditional", the sales/checkout counter should **NOT** be at the front of the shop. Instead, it should be at the back, in the middle, or at least half way towards the back. This will cause customers to walk by your merchandise/displays and increase sales substantially. The location of your sales counter area will be dependent on many variables in your facility.

- Avoid the "cluttered" look. If it looks like a mess, it is and if you can't find it, your customers surely can't. Arrange your shop to ensure plenty of aisle and display space. Turn over your merchandise and run specials to get rid of out-of-season stock and old hard goods. Replenish stock frequently to avoid cluttered look.

Step 21 (cont.)

- Provide dressing rooms for customers to try on and view the merchandise. Ensure your dressing rooms are CLEAN, spacious, safe, well-lit, and provide at least one full-length mirror..., and an opposite wall mirror is better. If space is an issue, use unisex-dressing room with key lock.

- Ensure you have adequate storeroom space to receive and store goods and prepare them for display on your sales floor, tables, racks, etc.

Step 22

Using your current inventory lists of your resale merchandise, classify your merchandise into related sales groups or departments.

- An example of related groups or departments for a golf pro shop could be:

  - Men's apparel.
  - Women's apparel.
  - Hard goods.
  - Miscellaneous.

- Be sure to consider your on-order and seasonal items as well as your current inventory.

Step 23 Determine the amount of space needed for each sales group or sales department.

There are two ways to determine the amount of space:

- Sales space based on the % of total sales for that department. (E.g., men's apparel sales divided by total pro shop sales.)
- Another method is based on the basic stock you plan on carrying in a particular department and the calculation of the amount of physical space needed for display and reserve stock.

NOTE:	Visit your competitors. You may not know what percentage of sales a group or department is allotted, but you can see how much physical space is provided (needed) to display and stock each sales group or product line.

Step 24 Select appropriate sales locations for each sales group or sales department with regard to the following factors.

Factors to consider in selecting location of merchandise departments:

☐ Ensure the sales items with the highest producing capacity are located in the most valuable location--near an aisle or entrance with high foot traffic. (E.g., "Name" brand clothing, hats and caps, golf gloves, golf balls, etc.)

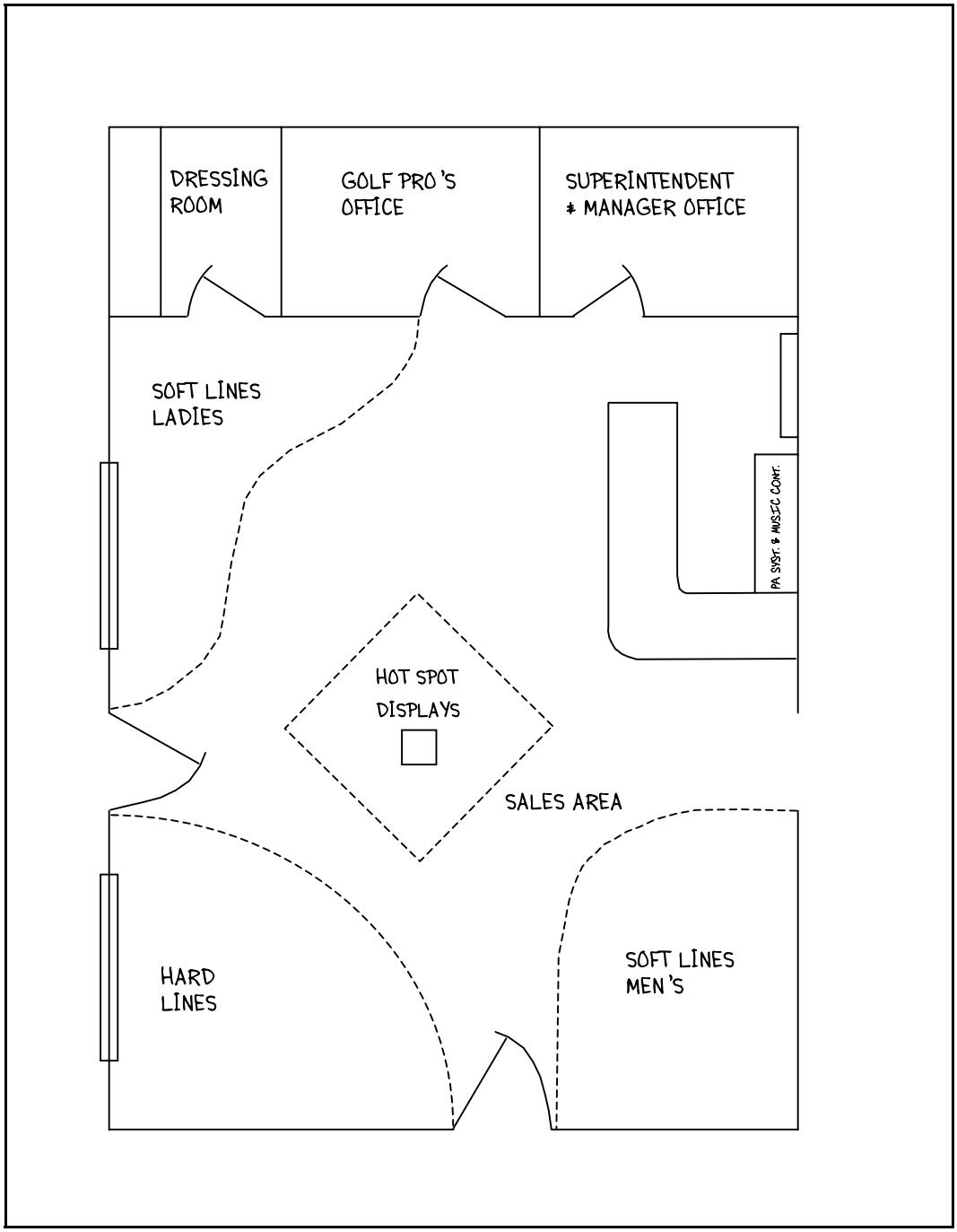
☐ Locate "impulse purchase" items in your most valuable sales spaces. These are the sales items, which your customers buy at the spur of the moment. These purchases are unplanned. These type items usually appeal to personal taste and are usually moderate to low-price items. (E.g., logo golf balls, repair tools, ball markers, snacks, jewelry, gift items, sunglasses, etc.)

☐ Locate "demand" items in your shops'/store's remote sales areas. These are the products that meet a need that your customers specifically come into the shop to buy. In most cases, these are usually medium to high priced items. These items are placed in remote locations so that your customers will have to walk past impulse items. (E.g., clubs, golf bags, shag bag, hand cart, golf shoes, etc.)

☐ Locate "convenience" items in the most accessible locations. These are sales items which have low unit value but are purchased frequently. (E.g., tees, ball markers, bug repellant, band aids, sun screen, etc.)

Step 25 Indicate these sales areas on your floor plans. See Example below.

Example:



Step 26 Develop internal layout of merchandise within a department.

NOTE:	Apply the same factors that you used for sales area/sales department locations to the location of merchandise "*within*" a sales area/sales department. • Impulse. • Demand. • Convenience. • Sales producing capacity. You will need to determine the amount of space and the location for each sales item. You need to decide what items you want to feature and how you will display those items.

Consider the following factors while making location and design decisions:

☐ Create an immediate positive image.

- Your customers will decide whether to buy products in your shop within the first 5 - 10 seconds.

- Ensure the first thing they see when they come in the main entrance of your shop is a full standing display of your featured higher ticket clothes items on a mannequin/form. (E.g. sweater, shirt, and shorts/pants/skirt, with glove and golf shoes, etc.) This creates an air of excitement--"a hot spot".

NOTE:	Be sure you have open space for this hot spot. It should not impede doorway traffic. If too close to the door, this display loses its impact.

- Locate some of these featured items for sale at the foot of the display.

- Identify additional areas for "hot spot displays" throughout the shop.

☐ The first third of the sales space in any department is the most valuable.

Step 26 (cont.)

☐ The wall is a highly visible selling/display area. Slat-walls with straight arms or hangout fixtures are used on wall displays. **(See list of merchandising fixtures/supplies/displays on page 10.10.39.)**

- Arrange merchandise in a symmetrical/balanced display.
- Use repetition of similar items/colors to create impact.
- For best impact use the entire wall-to-ceiling for merchandise and visual display. Merchandise beyond the reach of customers should be a duplication of those within reach.

☐ Fixtures are your primary sales/display area. When using fixtures consider the following:

- Fixtures should be flexible and movable.
- Do not use more fixtures than the spacing will allow.
- Spacing for fixtures should be 30-inches between fixtures (garment-to-garment) and 60-inches from wall fixture to the adjacent floor fixture.
- As you add sales space include more fixtures. Plan on 33 square feet for a four-way fixture.
- Floor positioning of fixtures should be grid method or in rows perpendicular to the main aisle/back wall to enhance merchandise visibility.
- Featured fixtures along aisles should be angled towards aisle and not shop entrance. This way merchandise will have the same visibility to customer coming from either direction. These racks should be rotated frequently to give the perception of new merchandise.

Step 26 (cont.)

- Tiered/nesting tables are used for folded merchandise (shirts, sweaters, pants, shorts) with a mannequin/form display on the top table/shelf.
- Four-way fixtures are used to feature coordinates and separates that form coordinated outfits.
- Rack-toppers with two "T-bars" are used to display accessories such as ball caps and golf gloves.

☐ Clothes should be in logical sequence with tops always above the bottoms. (E.g., shirts/sweaters displayed above shorts/pants/skirts.)

☐ Colors should be displayed light to dark left to right. Hang print colors and fold solid colors.

☐ Spacing on racks is 1/2 inch per garment and all pants items no higher than 4 inches from the floor.

☐ Sleeve lengths should be the same on displays.

☐ Sweaters should be displayed laying flat with small size on top to each larger size in sequence below. Use self-adhesive size-labels to display size to customer and reduce the customer having to dig through stack to find appropriate size.

☐ Stacks of pants should also have self-adhesive size labels.

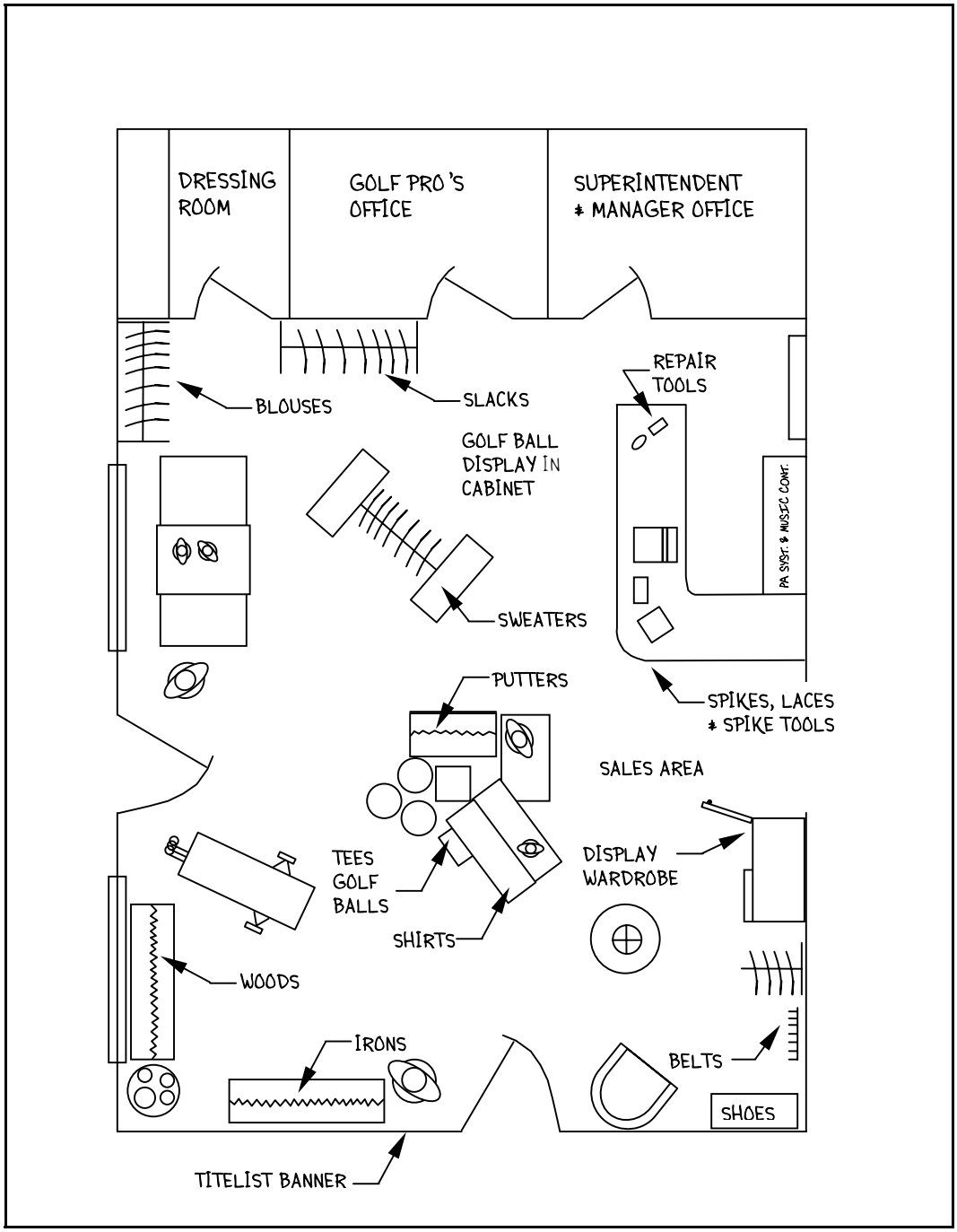
☐ Signage should be used to provide customer information that cannot be communicated solely by the merchandise. Signs should always be professionally printed--NEVER use handmade signs. All signs should be displayed in a sign holder.

Some uses for signs include:

- Advertised merchandise with sale pricing.
- Unadvertised, in-store, promotional merchandise with sale pricing.
- Value-priced merchandise.
- Advertising merchandise with new/improved features.
- Signs that show our price in comparison with our competition's price.

Step 27 Illustrate your internal layouts on your floor plans and/or on vendor provided plan-o-grams.

Example:



Step 28 Develop special promotional/theme events for your resale program.

NOTE:	You should always have holiday, seasonal, sales and theme/special events planned one year in advance just as you do your Program activities and events. (See tasks 3.1 and 3.2.)

Things to consider in planning your theme events are:

- ☐ Keep a perpetual calendar filled in with all major holidays, seasonal, special, community, and MCCS-wide events.
- ☐ Create a collection of props for theme events.
- ☐ Visit your competitors or other major retail operations to observe their promotions, sales, props, fixtures, signage, and their theme and special ideas to apply to your Program.
- ☐ Have fun with displays. The attitude and excitement you reflect will be infectious.
- ☐ Involve your staff and other Programs in your planning and execution of themes and events. Make it a team effort.
- ☐ Don't hesitate to sell/trade your display props (to other programs/ businesses) and replace them with something new.
- ☐ Make an effort to contact local reps and order props from catalogues.

Step 29 Illustrate your seasonal and promotional layouts on your floor plans or on vendor provided plan-o-grams.

- Maintain a file of your seasonal and promotional plans, ideas from catalogs, notes from trade-shows, vendors, and what you've seen in other businesses.

Step 30 Ensure your staff maintains the following merchandising elements every day.

Image:

- ☐ Is the shop and entrance clean?
- ☐ Are the windows clean and well lit?
- ☐ Is the overall shop consistent and easy to read?
- ☐ Does the store smell inviting?
- ☐ Is your background music appropriate?

Layout:

- ☐ Are the aisles clean and uncluttered?
- ☐ Are sight-lines maintained, allowing customers to see into and throughout the store?
- ☐ Are fixtures positioned to allow adequate room for the customers to comfortably shop and browse?
- ☐ Do focal points command the attention that draws customers into the depths of the store?
- ☐ Is the cashier's desk/check-out area neat and orderly?

Presentation:

- ☐ Is there something new and exciting at the front of the shop to greet customers?
- ☐ Is merchandise well organized and located in its proper places.
- ☐ Are your presentations neat, powerful, and easy to shop?
- ☐ Is merchandise positioned to encourage impulse sales?
- ☐ Do your fixtures tell a positive story?

Signage:

- ☐ Are your departments/sales areas well identified?
- ☐ Are your signs positioned at levels customers would expect to find the information?
- ☐ Are torn, taped, negative, handwritten, outdated signs removed from the selling floor (FOREVER!)?
- ☐ Are your promotional or advertised items well identified?
- ☐ Do your signs provide customers with important facts?

Step 30 (cont.)

Displays:

- ☐ Are your displays neat, dusted, and properly arranged?
- ☐ Are displays well lit?
- ☐ Is color used to draw attention to your displays?
- ☐ Is additional stock of the merchandise used in the display located nearby?
- ☐ Do the displays add appeal and romance to the merchandise?
- ☐ Do your staff members just sit/lounge around the sales/counter area or do they continually move around providing customer service and maintaining the shop?

Events:

- ☐ Do you have an event happening today?
- ☐ Are you prepared for today's events?
- ☐ Is there entertainment value in areas of the store where customers must wait?
- ☐ Are there opportunities, even informally, to demonstrate products for your customer?
- ☐ Do your presentations and displays encourage interactivity?

Cleanliness/sanitation:

- ☐ Are all your displays, props, fixtures, racks, and shelves clean?
- ☐ Are your glass cabinets, doors, and mirrors clean? (Clean these daily.)
- ☐ Are your floors clean? (Vacuum daily or more often if necessary.)
- ☐ Are your displays fully stocked? (Restock depleted merchandise items.)
- ☐ Is all the merchandise properly marked with price tags?
- ☐ What is the condition of your merchandise? (Reposition, refold, and/or realign merchandise that has been moved by your customers or staff.)

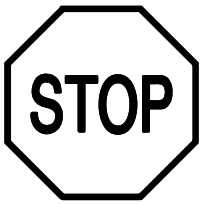
NOTE:	See applicable Tasks in Duty 8.0, Manage The Physical Plant for preventive maintenance, inspection, and safety procedures.

Step 31 Monitor your sales program/store during regular and special events to talk to/observe staff, customers, and vendors.

Use this opportunity to interact with all your key players.

You want to:

- Assess reaction to displays/special promotions.
- Observe traffic flow/patterns.
- Ask questions to identify interests, needs/wants, and discover what other stores they use.
- Observe sales and customer service techniques of your staff.



Congratulations! You've completed this task.

Your merchandising equipment and supplies may include:	
Bags	Lighting and Light Fixtures
Banners	Literature Displays
Barrels	Locks and Cables
Belt and Tie Displays	Mannequins and Mannequin Alternatives
Boxes	Metal, Wood, and Synthetic Shelving
Brochure Holders	Mirrors
Casters	Pegboard and Pegboard Hardware
Christmas/Holiday/Seasonal Items	Pennants
Clips	Pins
Contest Boxes	Poster Displays and Frames
Counters	Props
Counter Displays	Racks
Crates	Ribbons and Bows
Custom Counters/Displays	Security Systems, Items, and Hardware
Easels and Risers	Shoe Displays
Forms	Showcases and Showcase Locks
Garment Covers & Bags	Showcase Risers
Gift Wrap and Tissue	Sign Holders
Glass/Acrylic Cubes & Connectors	Signs and Sign Cards
Glass/Acrylic Shelving	Size Dividers
Grid	Slatwall and Slatwall Accessories
Hardware	Spinners
Hanger Helpers and Hangers	Steamers (for clothes)
Hangrails	Tables and Nesting Tables
Hat Displays	Turntables
Hooks	Wall Systems
Jewelry Displays	Warehouse/Stockroom Shelving
Label and Tagging Guns, Tags, and Labels	Waterfalls
Letterboards	

These items are available through your vendors, AFNAFPO, and companies that specialize in merchandising display equipment and supplies like the following:

Barr Display, 6424 Forest City Road, Orlando, FL 32810 800-222-2702
Beemark Plastics, 18554 S. Susana Rd., Rancho Dominguez, CA 90221 800-421-4393
K Metal Products, 11935 Baker Place, Santa Fe Springs, CA 90670 562-693-5425
Northern Wire Products, 6601 Ridgewood Rd, St. Cloud, MN 56302 320-252-3442
Midwest Plastics, 6460 S. 84th Street, Omaha, NE 68127 800-676-6460
Melrose Displays, Two Brighton Ave., Passaic, NJ 07055 973-471-7700
Packateers, 767 Hillview Rd., Malvern, PA 19355 610-353-4750
Display World, Inc., 426 Metacom Ave, Warren, RI 02885 401-247-7747
NEBS, Inc., 500 Main Street, Groton, MA 01471 800-225-6380
Store Supply Warehouse, Inc., 9801 Page Ave., St. Louis, MO 63132-1428 800-823-8887
ELL Enterprises, 2950 E. Hanna Ave., Indianapolis, IN 46227 800-837-7838
Robert H. Hamm, Associates, Ltd., P.O. Box 77398, Greensboro, NC 27417 800-334-6965

This year 1999 list does not represent MR endorsement nor is it all-inclusive. It is provided to give you a start point in locating merchandising equipment suppliers. Contact your local Marketing Office for assistance in ordering and needed supplies and/or equipment.

MCCS MANAGERS' DESK REFERENCE
DUTY 10.0 - PROMOTE YOUR MCCS PROGRAM

TASK 10.11

Create and Maintain a Focused Program Image

DO THIS TASK WHEN

- Working on initiatives to create positive memorable customer experiences.
- Working on initiatives to Achieve World Class Customer Service.
- Working to change how your customers/patrons perceive your current MCCS Program.
- Meeting and continuously improving customer satisfaction.
- Using the Analyzing Customer Experiences to improve your MCCS Program.
- Trying to increase usage/business in your Program.
- You have outgrown an image that was appropriate a few years ago.
- The size/scope of your Program has changed as a result of down-sizing, regionalization, competitive sourcing, reorganization, re-invention, or growth.
- You have changed (or are preparing to change) location, facilities, etc., including significant renovations.
- You, your staff, and your customers/patrons are confused about the purpose, vision, mission, goals, and objectives of your Program.

DO THIS TASK WHEN (cont.)

- You and your immediate supervisor and other senior leadership believe (or sense) that your Program is in a rut and could profit by an updated or more focused identity.

REFERENCES

- Improving Your Company Image, Silvia Ann Blishak, Crisp Publications, Inc., Menlo Park, CA, 1992.
- Star Service: Achieving Extraordinary Customer Relations (AECR), AchieveGlobal, Inc., Tampa, FL, 1998.
- Star Service: Coachinig for Extraordinary Service (CfES), AchieveGlobal, Inc., Tampa, FL, 2000.
- Star Service: Keeping The Skills Alive - A Coach's Toolkit, AchieveGlobal, Inc., Tampa, FL, 1998.
- Fabled Service, Betsy Sanders, Jossey-Bass Publishers, San Francisco, CA., 1995.
- Raving Fans, Ken Blanchard and Sheldon Bowles, William Morrow & Co., Inc., New York, NY., 1993.
- Knock Your Socks Off Service, (the series), Ron Zemke, (et.al.), American Management Association (AMACOM), New York, NY, 1998.
- What Every Supervisor Should Know, Lester Bittel and John Newstrom, McGraw Hill, New York, NY, 1990.
- Maximizing Golf Shop Profits Workshop©, Kathy Talbot Denton, Education, Training, and Consulting (E.T.C.), Inc., San Antonio, TX, 1995.
- MCCS Softlines Merchandise Presentation Standards.

SUPPLIES/ RESOURCES

- The results from accomplishing Task 10.10, Ensure Merchandising Effectiveness.
- The results from accomplishing Task 4.2, Ensure Extraordinary Customer Service.
- Current MCCS customer survey and similar assessment data indicating your customers'/patrons' preferences, wants, needs, priorities, opinions, and expectations.
- Current demographic, cultural, generational, educational, experiential, attitudinal, beliefs, and values information about your customers/patrons.
- Current performance data. (E.g., financial data, patronage/participation numbers, bottom line figures, profit figures, Cost of Sales (COS) numbers/ percentages, customer/patron satisfaction scores, etc.)
- Current inventories and condition reports of all your Program's facilities, equipment, machinery, vehicles, resale merchandise, merchandising items, and supplies.
- Your MCCS Managers' Desk Reference set.
- Staff members who possess the skill, knowledge, ability, and commitment to meet/exceed your customers'/ patrons' needs and expectations.
- A clean, attractive, and safe environment (facilities and grounds) necessary and appropriate for the delivery of extraordinary MCCS Program activities, events, products, and services.
- Quality equipment and "just-in-time" supplies in sufficient quantities for you and your staff to deliver extraordinary MCCS Program activities, events, products and services.

SUPPLIES/ RESOURCES (cont.)

- MCCS Program vision, mission, goals, and guiding principles that define how you and your staff will meet and exceed your customers'/patrons' needs and expectations.
- Applicable MCCS World Class Customer Service training for all MCCS Directors, managers, supervisors, leads, and MR Division staff, management, and leadership.
- Computer and survey software.
- Typical office supplies and equipment.

THIS TASK IS DONE CORRECTLY WHEN

- You have a written description of how your Program is unique as compared to others that do the same or similar things.
- You, your staff, and your Program's physical environment project an identity that reflects the vision, mission, personality, and goals of your Program, the MCCS Program, and senior management.
- Your internal and external customers'/patrons' first impressions are positive ones with every exposure to you, your staff, and your Program's physical environment.
- Your internal and external customers'/patrons' enduring impression of your Program is positive.

THIS TASK IS DONE CORRECTLY WHEN (cont.)

- Your internal and external customers'/patrons' impression of your Program is one that aligns with your Program's guiding principles, beliefs, ethics, and values.
- There is alignment between how you, your staff, and management perceive the Program, and how your customers/patrons perceive the Program. There are no mixed messages.
- Your customers/patrons expectations of your Program align with what your Program actually does.

NOTES

Your Program's/business' "IMAGE" is the result of:

- Everything you and your staff say and do, and how each of you behave in every customer/patron interaction.
- The value, effectiveness and professionalism of each of your Program's activities, events, products, and services.
- The convenience, functionality, appearance, and locality of your facilities, grounds, equipment, supplies, resale merchandise, and vehicles.
- The effectiveness of your:
  - Merchandising.
  - Advertising.
  - Promotions.
  - Publicity.
  - Public Relations.
- The skill, knowledge, capabilities, competence, confidence, tact, and manners used on the job by you, and each of your staff.

NOTES (cont.)

- Everything you and your staff do to satisfy your customers/patrons, to exceed their expectations, and to make them happy.

- The apparent joy and willingness of each of your staff members to consistently, fairly, and professionally serve all customers/patrons.

- The existence of systems, staff development, delegation, and "permission" to resolve customer/patron problems and answer their complaints.

- An effective and institutionalized recovery procedure.

- Fair and reasonable fees, prices, and/or charges for your activities, events, products, or services provided.

- **Consistency--doing what you say you will do, every time!**

This task is not just about the invention of a "new" name, spiffy decor, matching uniforms, clever slogans, modern business cards, color-coordinated stationery/letter head, an advertising "blitz", or redone signs...., although these are all important aspects of your image.

It is all about what you and your people do and how you behave that creates impressions..., and it's the sum total of your consistent internal and external customer service impressions that establish, demonstrate, and sustain your image.

This task will ask you to examine your current image and challenge you to thoroughly define what your Program and staff are about.

Using applicable Tasks in your MCCS Manager's Desk Reference you will develop a plan of action to improve or sustain your Program's image.

NOTES (cont.)

Your Program's image is how you look to and are remembered by your customers/patrons. Your image is created and maintained, in part, by having and/or accomplishing the following:

- Professional and committed management and staff.
- Customer service "systems" that achieve extraordinary customer service results.
- Attractive, well-maintained facilities and grounds.
- Quality and appropriate activities, events, products, services, equipment, machinery, resale merchandise, supplies, and vehicles.
- An effective marketing plan.
- A reputation for value pricing.
- Effective marketing that includes:
  - Customer/patron needs/assessments.
  - Merchandising.
  - Advertising.
  - Promotion.
  - Publicity (news).
  - Public relations.

Maintaining a positive image and providing "Fabled", "Knock-Your-Socks-Off", "Raving Fan", World Class Customer Service results in attracting and retaining customers/patrons and in receiving their loyalty to your Program.

Customer/patron loyalty is demonstrated by repeat sales (and/or usage), and in their willingness to tell their family, friends, colleagues, and even casual acquaintances about you and your Program.

NOTES (cont.)

A less-than-positive image will:

- Work against your vision, mission, guiding principles, goals and objectives.
- Cost you your customers'/patrons' goodwill and their willingness to talk positively about your Program.
- Cause some customers/patrons to actually find joy in hurting your reputation.

This task will:

1. Ask you to examine the image of other businesses and Programs.
2. Examine your own Program image through your eyes and the eyes of others.
3. Describe the image you want your business to project.
4. Develop and implement a plan of action to achieve this new image.

A great image comes from a great imagination, teamwork, effort, time, willingness to change, and individual flexibility!

Soooo, let's get to it!

PROCEDURE

Step 1 Examine the image of other businesses.

☐ Actually go to other businesses in your local area and decide what image they project. (These do not have to be businesses that are exactly like your Program--**you are just practicing how to "recognize" image elements**.)

☐ Take one or two of your staff members or other MCCS Program colleagues so you can discuss what you see and don't see.

☐ At each place you visit, study the following:

- What is your first impression as you approach and enter the business? Were you greeted/acknowledged? Do you feel welcome?
- Before you go in, can you tell what they do? What do they sell or what service(s) do they provide?
- Where are they located? Does this location seem convenient? To whom and why? Does the business relate to the area? Is the area safe? Why/why not?
- What days and hours do they operate? Why? Are these convenient hours?
- Look at the decor, colors, designs, size, shapes, proportions, arrangement of departments, signage. How do they look to you? Why?
- If this is a self-serve type business? If so, look for a few things. Are the items easy to locate? Did a staff member offer to assist? How quickly?
- Is the facility clean? How does it smell? What sounds (music, noise, etc.,) are present? Does the facility look safe?
- Without being too obtrusive, introduce yourself and your purpose and ask one or several customers/clients how often they use the business and why?
- How do they merchandise?
- What publicity and public relations initiatives do they use?
- What are they currently promoting? Is their pricing clear? Does their pricing seem competitive? Do they use "loss-leader" promotions?
- How and where do they advertise? What media? How often? Is it effective?
- Do their advertising and their products/services match?
- Do they seem up-to-date in their field? Why or why not?
- Talk with their staff and managers. What is your reaction? Are they well-mannered, considerate, articulate, knowledgeable, and professional (or not)? How do they look? (Clean, neat, well-groomed, uniformed (or not)? How do they behave? Are they solemn, glum, rude, glib, happy, etc?
- If this is not a competitor, ask one or more of the managers or the owner/operator how they see themselves. How do they project their image?
- What is your impression as you leave the business? If you were a customer, and this wasn't the only business of its kind, would you return? Why or why not? Were you "thanked"? Invited back?
- What would you tell others about this business? Why/why not?
- Call the business and ask for assistance. What impression did you form from the call? Did it match impressions you had from your visit?

Step 2 Consider the image that pops into your mind when you think of major local and national/international businesses.

☐ Discuss with your team and colleagues what "image" comes to mind when you think of these various businesses? What constitutes the images of their various businesses?

NOTE:	You don't need to discuss each of these. This list is just to "prime the image discussion pump".

- K-Mart, Wal-Mart, Target, etc.
- Sears, J.C. Penny, etc.
- Bloomingdale's, Belk's/Leggit's, Nordstrom's, etc.
- McDonalds, Burger King, KFC, etc.
- Bell South, AT&T, Pacific Bell, etc.
- Ford, General Motors, Chrysler, Honda, Nissan, Toyota, Volvo, Mercedes, BMW, etc.
- Northwest Airlines, Delta, United, Southwest Airlines, etc.
- Giant, Safeway, Farm Fresh, A&P, Food Lion, Von's etc.
- Izod, Gant, Ashworth, Polo, Van Heusen, Arrow, etc.
- US Postal Service, Federal Express, UPS, etc.
- Shell, EXXON, Texaco, AMACO, Citgo, BP, etc.
- Roadway, Atlas Van Lines, Yellow Freight Lines, etc.
- Front Gate, Miles-Kimball, Smithsonian, Sharper-Image, Land's End, L.L.Bean, Orvis, Gander Mountain, Bass ProShops, etc.

☐ Discuss these "images" with your staff, supervisors, managers, immediate supervisor, customers/patrons, and colleagues.

- What image came to mind? Why? What has the business or organization done to achieve this image? How do they sustain it?
- If you have used the products or services of one of these businesses or organizations, does their image match their actual products and/or services? Why or why not?
- What is it about these businesses/organizations that has helped them sustain significant market share over the years?

Step 3 Using the outcomes of Steps 1 and 2, decide which image issues are important to your Program and to you, your staff, and to the MCCS Program, Command, and the Marine Corps.

NOTE:	Resist the urge to check each of these image elements. While it would be great to integrate all of these and perhaps be "perfect", it's probably not very realistic.

- ☐ Honesty, integrity, decency, and fairness.
- ☐ Consistency, dependability, and reliability... Doing what you say you will do, every time!
- ☐ Manners, protocol, and appropriate business etiquette.
- ☐ Fun and the apparent joy and willingness of your staff to consistently, fairly, appropriately, and professionally serve each of your Program's customers/patrons.
- ☐ World Class Customer Service.
- ☐ Keeping promises.
- ☐ Meeting/exceeding your customers'/patrons' expectations.
- ☐ Having everything your customers/patrons want/need.
- ☐ Value. Fair and reasonable fees, prices, and/or charges for your activities, events, products, and/or services provided.
- ☐ Quality activities, events, products, and services.
- ☐ Product knowledge (lines, features, and benefits).
- ☐ Professionalism.
- ☐ Recovering from mistakes.
- ☐ Cleanliness of your Program's equipment, supplies, resale merchandise, vehicles.
- ☐ Safety of your Program's equipment, supplies, resale merchandise, vehicles.
- ☐ Adhering to rules, regulations, policies, practices, and procedures.
- ☐ Attractive and modern facilities.
- ☐ Unique, focused, identifying, and memorable business name, slogan, trademark, logo, mascot, etc., aligned with your Program's vision, mission, and guiding principles.
- ☐ Convenience of your Program's equipment, supplies, resale merchandise, vehicles.
- ☐ Functionality of your Program's equipment, supplies, resale merchandise, vehicles.
- ☐ Merchandising.
- ☐ Advertising.
- ☐ Promotions.
- ☐ Publicity.
- ☐ Public Relations.
- ☐ Systems, staff development, delegation, and "permission" (authority) to solve your customers'/patrons' problems and/or answer their complaints.
- ☐ _____
- ☐ _____

Step 4 Gather information about your Program's **current** image.

NOTE:	Every MCCS Program, like every business or organization, projects its own unique image. You may not have consciously planned it or given it much thought, or just the opposite--you may have planned it and created an image that attracts and retains customers/patrons.

☐ Ask your customers/patrons and others about their first impressions. (Use the **Bad First Impression List** in Task 4.2, Ensure Extraordinary Customer Service for a complete list of areas.)

NOTE:	According to studies, first impressions are formed within as little as 5 seconds. And many of these initial impressions about your Program's activities, events, products, and services are lasting ones. Negative first impressions create a poor image and can permanently alienate your customers/patrons. Positive first impressions create a good image and can predispose your customers/patrons to overlook minor problems.

☐ Compare your Program to the **Indicators of Good Customer Service** List in Task 4.2, Ensure Extraordinary Customer Service.

NOTE:	Achieving most of the items in the list will result in a positive image.

☐ Ensure your Program isn't giving your customers/patrons mixed/wrong messages.

For example:

- Having an upscale atmosphere, decor and equipment, and then serving the products with plastic baskets and plastic ware.
- Serving meat-loaf, mashed potatoes, gravy, hot roast beef sandwiches and similar "comfort foods" with a formally attired wait staff, serving on fine china with a silver service.
- Selling an upscale catering menu out of your snack bar.
- Appearing focused ONLY on profit rather than VALUE and BENEFITS.
- Running a major promotion or publicity blitz that over-promises activities, events, products, and services that you can't deliver/sustain.

☐ Ask your immediate supervisor and colleagues from other Programs to use and comment on your Program's "face-to-face" image.

Step 4 (cont.)

☐ Ask your immediate supervisor and colleagues from other Programs to call your Program on the telephone to request information and services. Ask for their comments on the telephone image presented.

☐ Look for misalignments between what your Program promises, your customers'/patrons' expectations, and what your Program actually does, provides, and/or practices.

The areas to examine include:

- All your Program's activities, events, products, and services.
- The appearance of your facilities and grounds.
- The appearance, safety, and cleanliness of your Program's equipment, supplies, resale merchandise, vehicles.
- Your pricing/perceived value.
- Your customer service.

☐ **Make copies of the worksheets on pages 10.11.17 through 10.11.21.**

☐ Ask your customers/patrons, gatekeepers, other Program managers, and your senior leadership about their observations, perceptions, and opinions of the following image elements:

- Program recognition elements.
- Customer/patron first impressions.
- Customer/patron service specifics.
- Staff and management behavior with internal and external customers/ patrons.
- Staff and management appearance.
- Activities, events, products and services. (Meeting customer/patron needs.)
- Resale merchandise, if applicable.
- Equipment, machinery, supplies and vehicles.
- Merchandising.
- Advertising, promotions, publicity, and public relations.
- Fees, prices, and charges (value & benefits).
- Keeping promises and solving customer/patron problems.
- Face-to-face and telephone communications.
- Misalignments between what your Program promises, your customers'/patrons' expectations, and what your Program actually does, provides, and/or practices.

Step 5 Write a description of an ideal image that uniquely and specifically identifies your Program. (See example on Page 10.11.23.)

> **NOTE:** The process of creating and writing an ideal image is similar to the simple visioning exercise found in the NOTES Section of Task 4.2, Ensure Extraordinary Customer Service. Just "imagine" a perfect and "unique" Program, then record what that **image** is.
>
> Remember--A positive image communicates a clear message about the personality of your Program and why your activities, events, products, and services are special.

- ☐ Involve your staff in the development of your ideal image to enlist their support, ensure accomplishment, and create a powerful force for building and sustaining a positive image.
- ☐ Ensure your image includes the elements you checked in Step 3.
- ☐ Ensure your image uniquely and specifically identifies your Program from what others do or offer.
- ☐ Ensure your image serves as a screening device as well as a promoting/advertising device. This will save you and your customers/ patrons time by identifying and appealing to your Program's limited segment of the market and discouraging unrelated business inquiries. (Remember--Your Program cannot be all things to all people.)
- ☐ Include the use of a name, logos, mascots, and slogans that identify, support, and promote your Program and its image.

> **NOTE:** These Program identification elements make it easier for the customers/patrons to identify/differentiate your business. Ensure these let your customers/patrons know what you do.
>
> **Example:**
>
> Which names are better at telling customers/patrons what you do? Eagle's Nest or Eagle's Nest Golf Course? The Landings or The Landings Family Restaurant? Fitness Center or Sunrise Health and Fitness Center? Outdoor Gear Issue or Northwest Outfitters? Wood Hobby or Sawdust & Splinters? Other descriptive examples include: Ticket Express, The Oceanview Catering & Conference Center, Generation Rec, Strike Zone, etc.

Step 5 (cont.)

☐ Describe your staff dress code/uniforms and grooming standards.

NOTE:	Staff appearance, clothing, grooming, and uniform items contribute significantly to a positive business image. You and your staff need to determine what dress codes, grooming standards, and uniform items would enhance the image of your Program.

☐ Detail your telephone, fax, e-mail standards.

NOTE:	The telephone is an invisible image that makes a lasting impression on your customers/patrons. Their impressions are tarnished when put on hold for an extended time; cut off; answered by an indifferent person/ greeting; told "No" too often; not getting answers or being passed on to another staff member; receiving outdated or inaccurate information, etc. Your Program's telephone image is vitally important to your success.

Step 6

Prepare a plan to implement your new/enhanced image.

NOTE:	Now, that you know your ideal image and your current image, identify what changes are needed to close the gap. These changes might involve your current culture and traditions. You may need to change your policies, procedures, and practices. You may also need to change your Program's activities, events, products, services, or your customer service behaviors.

☐ Work with your staff to identify what changes are needed to close this gap.

☐ Ensure you and your staff brainstorm, evaluate, and prioritize ways to implement these ideas.

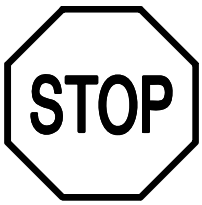
Step 7 Record your image improvement plans/initiatives in whatever planning documents you use.

- Program goals and objectives.
- Short/long-term (5-Year) program management plan.
- Daily things-to-do list.
- Tickler files/database.
- Detailed activity plans.

Step 8 Observe and coach your staff to ensure their skill/knowledge, abilities, attitudes, and behaviors support your Program's image.

☐ Every member of your staff presents a clean, neat, well and professionally groomed, and properly attired image.

☐ Every member of your staff presents an informed, helpful, willing, articulate, good natured, pleasant, caring, friendly, and well-mannered image.



Congratulations! You've completed this task.

CURRENT IMAGE WORKSHEET	
Ask your customers/patrons, gatekeepers, other Program managers, and your senior leadership about their observations, perceptions, and opinions of the following image elements:	
1.	Program recognition. (Name, slogans, logo, mascot, etc.)
2.	First impressions. (See Bad First Impression List in Task 4.2.)
3.	Customer/Patron Service specifics. (See the Indicators of Good Customer Service List in Task 4.2.)
4.	Staff and management behavior with internal and external customers/patrons.
5.	Staff and management appearance.
6.	Activities, events, products and services (meeting customer/patron needs).

CURRENT IMAGE WORKSHEET (cont.)	
7.	Resale merchandise, if applicable.
8.	Equipment, machinery, supplies and vehicles.
9.	Merchandising.
10.	Advertising, promotions, publicity, and public relations.
11.	Fees, prices, and charges (VALUE & BENEFITS).
12.	Keeping promises/solving customer/patron problems.

CURRENT IMAGE WORKSHEET (cont.)	
13.	Mixed/wrong messages.
14.	Misalignments between what your Program promises, your customers'/patrons' expectations, and what your Program actually does, provides, and/or practices.
15.	Colleague's and immediate supervisor's comments on your "face-to-face" image.
16.	Colleague's and immediate supervisor's comments on your "telephone" image.

EXAMPLE IMAGE DESCRIPTION

Our image goal is to be our customers/patrons #1 choice for their..., (whatever). After meeting, our managers, supervisors, staff, and key members from the Command, and selected customers identified and decided to focus our "image" improvement efforts on the following:

1. Demonstrating that we are professional and committed.

   Indicators:
   - Staff members are knowledgeable, trained, informed, friendly, and empowered to solve customers'/patrons' problems and answer complaints.
   - Staff appears clean and well groomed and wears appropriate dress/uniform.

2. Providing World Class customer/patron service and relations:

   Indicators:
   - Staff members call customers/patrons by name and acknowledge/greet promptly.
   - Staff members exhibit observable fun, joy, care, willingness to help and serve others, and appropriate business protocol and manners.
   - Staff members use the Human/Business Model.
   - Customers/patrons praise the Program.
   - The Program receives high customer satisfaction scores.

3. Providing superior, top-quality activities, events, products and services.

   Indicators:
   - All activities, events, products and services are designed/selected based on customer/patron input/needs data.
   - All activities, events, products and services are provided/delivered so as to meet/exceed our customers'/patrons' needs, wants, expectations and perceptions.
   - Our systems, procedures, processes, policies, habits, and our culture are designed to be "customer-friendly" and "policy-transparent".
   - Our activities, events, products and services are comparable to like items in the private sector for similar target audiences.
   - Our activities, events, products and services are reported by our customers/ patrons as providing <u>both</u> VALUE and WORTH.

SAMPLE

EXAMPLE IMAGE DESCRIPTION (cont.)

4. Ensuring that we have and maintain attractive facilities, equipment, machinery, and supplies.

   Indicators:
   - We maintain clean and sanitary facilities as indicated by the highest marks/averages on safety and sanitation inspections.
   - We maintain our equipment, machinery and facilities to minimize "Out-of-Order" conditions.
   - Customers/patrons comment on their "positive" first and continuing "good" impression.
   - Minimal or no negative remarks from our customers/patrons about the facilities, equipment, machinery, and supplies.

5. Be perceived as providing customer/patron value and worth.

   Indicators:
   - Repeat business and customer/patron loyalty.
   - Customers/patrons tell others about the Program.
   - Minimal or no complaints about pricing.
   - Customer comment cards rate "HIGH" overall satisfaction.

6. Providing effective advertising, promotion, publicity, and public relations.

   Indicators:
   - Activities, events, products, and services appropriate to the target audience(s).
   - Customer/patron expectations are created by advertising and promotions.
   - Usage/sales high/increasing.
   - Advertising and promotions are consistent with actual delivery.
   - Advertising/promotion timely so that customers/patrons can "PLAN" their recreation/FB&E experiences well in advance.

SAMPLE

MCCS MANAGERS' DESK REFERENCE
DUTY 11.0 - EVALUATE PROGRAM/ACTIVITIES/EVENTS

WHAT THIS DUTY DOES

You have assessed your Program needs, set goals and objectives, planned, budgeted, trained/developed, used your resources, managed the environment, equipment and supplies, and implemented your activities/events. Along the way you have observed the process, gathered a lot of feedback, and probably have some idea of the effectiveness of your Program.

This section ties it all together. It completes or begins the program/management cycle. The outputs of these tasks are often the input for another needs assessment.

The tasks included in this duty are:

11.1 Develop Evaluation Plan.

11.2 Prepare Evaluation Instruments.

11.3 Collect Evaluation Data.

11.4 Analyze Data/Determine Appropriate Actions.

11.5 Prepare Evaluation Summary.

Applying a systematic evaluation process to your Program's activities, events, products, and services will assure the management cycle is strong. Like the weak-links of a chain, if the evaluation process is weak, the management chain of needs assessment, program planning, and implementation will be weak, also.

MCCS MANAGERS' DESK REFERENCE
DUTY 11.0 - EVALUATE PROGRAM/ACTIVITIES/EVENTS

TASK 11.1

Develop Evaluation Plan

DO THIS TASK WHEN

- You want to confirm whether or not your customer's/ patron's MCCS needs/preferences are being met by your Program's activities, events, products, or services.
- You want to confirm whether or not the Command's or other leadership groups' MCCS needs/preferences are being met by your Program's activities, events, products, and services.
- You want to determine if, and how, changes in the customer/patron base may affect your Program.
- You want to assess the potential impact of Program reductions, consolidations, changes, or elimination.
- You are getting ready to develop major program activities/events and want to determine customer/patron reaction.
- You want to assess the impact of your activities, events, products, and services on a regular basis or at the time of delivery.
- You want to assess customer/patron preferences, priorities, and opinions about your Program's activities, events, products, services, customer service, quality, value, etc.

REFERENCES

- Figuring Things Out, A Guide to Needs Analysis, Zemke & Kramlinger, Addison Wesley Publishing Co., Menlo Park, CA, 1982.
- Statistics, A Spectator Sport, Richard M. Jaeger, Sage Publications, Newbury Park, CA, 1990.
- Needs Assessment, Taking The Pulse of The Client, Texas A&M University, College Station, TX, 1983.
- Recreation Programming, Designing Leisure Experiences, Rossman, Sagamore Publishing, Champagne, IL, 1989.
- How To Conduct Organizational Surveys; A Step-By-Step Guide, J. Edwards, M. Thomas, P. Rosenfeld, S. Booth-Kewley, Sage Publications, Thousand Oaks, CA, 1997.

SUPPLIES/ RESOURCES

- Sample evaluation surveys/questionnaires.
- MCCS Managers' Desk Reference, Duty 1.0, Tasks 1.1 through 1.5.
- Current MCCS customer survey data from MR sponsored or administered surveys.
- Current MCCS program evaluation data. (E.g., data gathered by local assessments, surveys, comment cards, focus groups, etc.)
- Program planning calendar.
- Current budget and financial statement information.
- Current usage data.
- Computer and survey/evaluation software.

THIS TASK IS DONE CORRECTLY WHEN

- Your evaluation plan will gather data/information that reflects your customers'/patrons' opinion about the following results of your Program's activities, events. products, and/or services.
  - Impact.
  - Cost/benefit/value.
  - Quality.
  - Customer/patron satisfaction.
  - Customer service.
- Your evaluation plan will gather data/information that indicates whether your customer's/patron's MCCS wants, needs, preferences, and expectations are being met.
- Your evaluation gathers data that determines whether the Command's or other leadership groups' MCCS priorities are being met.
- Your evaluation plan will gather timely data in a cost-effective and efficient manner.

NOTES

There are many times when you should evaluate your Program.

These include:

- Changes in management.
- Reaching short/long-term plan milestones.
- Changes in customer/patron priorities/interests.
- Changes in your industry/field.
- Sustained decline in customer/patron participation.
- As industry fads and trends evolve.
- When indicated by negative trends in your financial data, customer service satisfaction numbers, attaining performance standards/goals, etc.
- Prior to budget preparation.
- Upon delivery of products and services.
- At the conclusion of each activity/event.

Whatever the reason, you need information from these evaluations to make proper decisions, avoid subsequent mistakes, and to prioritize your resources.

A well developed evaluation plan for the current year will help you to determine:

- If your Program is accomplishing its goals and objectives.
- The Program's strengths and weaknesses.
- Cost versus benefits.
- Who your future customers/patrons are most likely to be.

In addition, the evaluation plan will help you to gather information to assist you in marketing/promoting future activities, events, products, and/or services.

PROCEDURE

Step 1 Determine the desired outcome(s) and/or critical areas of focus of your evaluation.

For example, you may want the evaluation data to support:

- What is needed to improve service to customers/patrons.
- The current focus of the program activities, events, products, and services.
- What activities, events, equipment, products, and services your customers/ patrons prefer.
- How your customers/patron value your Program's activities, events, products, and services.
- What would be the most widely accepted days and hours of operation.
- How well the activity/event does financially.
- The adequacy of the current facilities/equipment.
- Reasons why your customers/patrons use your Program's activities, events, products, and/or services. (E.g., social benefits, physical fitness, convenience, price, value, learning opportunities, etc.)
- What, in the respondent's opinions, would be needed to ensure a safe, secure facility/operation?
- Attendance figures/potential for participation. Recommend participation to others.
- Whether or not to change/start/stop specific program activities, events, products, or services.

NOTE: When determining your desired outcomes, ask yourself:

"What do I want to know?" "Why? "What questions will the data answer?"

Then ask, "Once I have this information, how will I use it?"

Remember, the information gathered during the evaluation may be either good or bad as far as your outcomes are concerned. But, however the information turns out, you have to use it. Therefore, knowing before hand how you will use this information will save you time later.

Step 2 Determine the types of evaluation that will make up the plan.

- Overall program evaluations. (E.g., Single Marine Program, Golf, Child Development, Bowling, Athletics, Snack Bar etc.)

- Evaluation of specialized parts of your Program. (E.g., Birthday Balloon-O-Grams, St. Patrick's Day Scramble, Mommy-and-Me Picnic, equipment issue procedures, daily lunch specials, financial status, customer service, facility information, equipment preferences, quality, etc.)

Step 3 Use the table below to select the best method(s) for gathering the information you need.

IF YOU NEED:	THEN USE ONE OR MORE OF THE FOLLOWING DATA COLLECTION METHODS:
General or specific group opinions/preferences.	• Focus groups. • Comment cards. • Computer assisted surveys. • Personal observation/monitoring. • Written surveys/questionnaires.
Direct, individual input or opinion/preference.	• One-on-one interviews. • Computer assisted surveys. • Written surveys/questionnaires.
Policy, financial data, attendance records, or up-to-date industry information.	• Document/records review.

NOTE: Using more than one evaluation method typically provides more diverse responses.

See Task 1.1, Plan to Conduct Local Needs Assessments to determine the size coverage (entire group or representative sampling) you will need for your evaluation.

Step 4 Establish a plan of action and milestones (POA&M) for conducting your evaluation.

- ☐ Use staff/team meetings to ensure the POA&M is understood and supported by your supervisors, staff members, and all applicable stakeholders.
- ☐ Use applicable and relevant data to help you develop the evaluation plan.
- ☐ Address the issues below as needed in your evaluation plan.
  - ☐ Critical start/stop dates and times.
  - ☐ Staffing/volunteer requirements.
  - ☐ Word processing, marketing, data processing assistance.
  - ☐ Confirmation of assignments/responsibilities.
  - ☐ Necessary/required reviews & approvals.
  - ☐ Preparation needed for up-coming evaluation. (E.g., logistics/ supplies, etc.)
  - ☐ Scheduling of needed facilities/equipment.
  - ☐ Commitment of funds and other critical resources.
  - ☐ Background information on whatever you are going to evaluate.
  - ☐ Goals and objectives.
  - ☐ Budget for the evaluation process.
  - ☐ Detailed activity plans.
  - ☐ Previous evaluation plans.
  - ☐ Needs assessment data:
    - Meeting/focus groups/interview.
    - Comment cards.
    - Survey/questionnaire data.
  - ☐ MCCS program requirements/standards.
  - ☐ Short/long-term program plan.

Step 5 Develop a list of support requirements needed to conduct the evaluation.

Address the support requirements applicable to the purpose and scope of your evaluation.

☐ Budget requirements.

☐ Personnel/staffing requirements:

- Volunteers.
- Other MCCS colleagues.
- Supervisor(s).

☐ Time requirements.

☐ Administrative requirements. (E.g., word processing, filing, reproduction, mailing and marketing.)

☐ Data management requirements. (E.g., data entry, analysis, reporting.)

☐ Logistics and support materials/equipment. (E.g., computer, A/V, supplies, materials, facilities, respondent premiums/incentives/prizes, etc.)

Step 6 Ensure availability of the support.

IF SUPPORT IS:	THEN:
NOT available.	Go to Step 7.
Available.	Go to Step 8.

Step 7 Adjust plans to obtain the necessary support.

For example:

- Change location or dates of the evaluation focus group.
- Coordinate with MCCS marketing to provide data collection assistance.
- Adjust budget to obtain funds for evaluation.
- Hire temporary staff or recruit volunteers to assist with evaluation.
- Coordinate other facilities for use in evaluation.

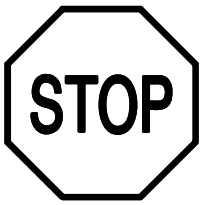
Step 8 Develop a plan of action to get buy-in and approvals for the evaluation from the MCCS Program, Command, and affected/interested members of the community.

Ways to accomplish may include:

- Brief key decision makers.
  - State the desired outcomes of the evaluation.
  - Review existing program needs.
  - Describe plans to meet these needs relative to the proposed evaluation.
  - Report and provide documentation presenting financial posture, benefits, strengths, weaknesses, customer/patron usage figures, etc.
- Publicize the upcoming evaluation through station newspaper, plan-of-the-day/week, flyers, signage, e-mail, installation closed circuit television, meetings with advisory boards and/or customer/patron groups, etc.

Step 9 Submit the plan to your immediate supervisor for review/approval.

IF:	AND:	THEN:
Plan is approved.	→	1. Implement Plan.
Plan is **NOT** approved.	Changes are recommended.	1. Make the changes. 2. Implement Plan.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 11.0 - EVALUATE PROGRAM/ACTIVITIES/EVENTS

TASK 11.2

Prepare Evaluation Instruments

DO THIS TASK WHEN

- You are preparing to collect data to:
  - Evaluate whether customer/patron needs or preferences are being met.
  - Determine whether the Command's or other leadership groups' MCCS program needs, preferences, or priorities are being met.
  - Determine if, and how, changes in the customer/ patron base may affect (or is affecting) your Program.
  - Assess the potential impact of Program reductions, consolidations, changes, or elimination.
  - Determine customer/patron reaction to new/proposed major program activities/events.
  - Assess the impact, effectiveness, and execution of your activities, events, products, and services on a regular basis or at the time of delivery.
  - Assess customer/patron preferences, priorities, and/ or opinions about your Program's activities, events, products, services, customer service, quality, value, etc.

REFERENCES

- Questionnaires: Design and Use, D.R. Berdie & J.F. Anderson, Scarecrow Press, Metuchen, NJ, 1974.
- Asking Questions: A Practical Guide to Questionnaire Design, Sudman & Bradburn, Jossey-Bass Inc., San Francisco, CA, 1982.
- Figuring Things Out, A Guide to Needs Analysis, Zemke & Kramlinger, Addison Wesley Publishing Co., Menlo Park, CA, 1982.
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- How To Conduct Organizational Surveys; A Step-By-Step Guide, J. Edwards, M. Thomas, P. Rosenfeld, S. Booth-Kewley, Sage Publications, Thousand Oaks, CA, 1997.

SUPPLIES/ RESOURCES

- Sample evaluations/questionnaires.
- MCCS Managers' Desk Reference, Duty 1.0, Tasks 1.1 through 1.5.
- Computer with word processing software.
- Forms design software.
- MCCS Managers' Desk Reference.
- Computer and evaluation software.

SUPPLIES/ RESOURCES

- Applicable documents/records selected for "document review". (E.g., usage reports/data, financials, customer/ patron comment cards, customer/patron correspondence, Quality Caller reports, Cycles of Service data, etc.)
- Results of your work from Task 11.1 and Tasks 1.1 through 1.5.

THIS TASK IS DONE CORRECTLY WHEN

- You have revised or developed an evaluation/survey instrument that solicits data/information about your customers'/patrons' opinions on your Program's:
  - Impact.
  - Cost/benefit/value.
  - Quality.
  - Customer/patron satisfaction.
  - Customer service.
- You have developed evaluation instruments/surveys that are written at the reading, attention, and interest levels of the target population from whom you will gather the data.
- You have an evaluation instrument/survey that will confirm whether you have met your customers'/patrons' Program needs, wants, preferences, priorities, and/or expectations.
- You have validated the evaluation/survey questions.
- You have an evaluation instrument/survey that will confirm whether you have met the Command's or other leadership groups' needs, preferences, and priorities.

NOTES

This task will help you prepare:

- Well-conceived and well-written evaluation questions.

- Properly designed and developed evaluation instruments.

Well conceived and written evaluation questions and properly designed and developed evaluation instruments are a must to ensure you collect valid, accurate, reliable, and relevant data.

Regardless of the data collection method you chose when you did Task 11.1, Develop Evaluation Plan, to gather meaningful and useful data you must:

- Ask relevant questions of users and participants in your Program and of those who have responsibility and/or interest in the Program.

- Look for applicable data in the correct documents.

- Design evaluation instruments that:

  - Provide reliable and valid responses.
  - Are easy for the respondent to complete.
  - Are easy to collect.
  - Are easy to analyze.

NOTES (cont.)

Our use of the term "evaluation instrument" refers to the forms you will design and use to record:

- Responses from interviews.
- Responses from focus groups.
- Responses from questionnaires.
- Findings from a document/records review.

NOTE:	You are not expected to be the expert in developing evaluations. Use the expertise from your MCCS Marketing Office.

This task provides guidance for writing and testing questions for any of these assessment methods:

- Interviews.
- Focus groups.
- Questionnaires.
- Document/records review.

PROCEDURE

WRITE & VALIDATE QUESTIONS

Step 1 Prepare a DRAFT list of evaluation questions using the guidelines presented in Task 1.2, Design/Develop Data Collection Instruments.

Step 2 Validate (pretest) your questions.

☐ Pretesting the evaluation questions will avoid:

- Omitting vital questions from the evaluation.
- Asking questions that may seem perfectly clear to you, but are misinterpreted by respondents.
- Spelling, grammar, and punctuation mistakes.
- Typographical flaws that make your survey appear less than professional.

☐ The more ways you pretest, the safer you are in assuming accuracy of results. The following is a list of ways to pretest. Select those applicable to your evaluation needs.

☐ Send drafts of questions to your immediate supervisor, asking for comments and a confirmation that you've asked for all data that is needed. (He/she may wants/needs to *piggy-back* the evaluation.)

☐ Circulate drafts of questions to your colleagues for comments.

☐ Show drafts of questions to a group of potential respondents and discuss the following:

- General comments and concerns about the nature, focus, purpose, and tone of the evaluation.
- Clarity of the questions.
- Suggestions for improving, adding, deleting questions.

Step 3 Revise questions as applicable.

NOTE:	Repeat Steps 1 and 2 until you have a list of questions you are confident will work.

Step 4 Run a trial evaluation with a group of six to ten potential respondents.

- Include several of your staff in this trial.

Step 5 Ask the people who will analyze the data to perform a trial run with responses from the trial evaluation.

Step 6 Revise draft questions as applicable.

Step 7 Organize your evaluation questions and notes based on the evaluation method(s) you chose in Task 11.1, Develop Evaluation Plan.

- Your work to this point may have altered your original decisions about the survey method--that's okay.
- Task 1.7, Manage Meetings, Briefings and Presentations provide detailed guidance for preparing and conducting meetings which can be applied to your evaluation interviews and focus groups.

IF METHOD IS:	THEN:
Interviews. **- OR -** Focus Groups.	1. Prepare an outline for conducting your interviews/focus groups that includes: • Introductions. • Reason(s) for using interview/focus group. • Confidentiality & how responses will be used and protected. • Name of evaluation administrator. • Nature and size of the sample. • Approx. how long the interview/focus group will take. • Disposition of the evaluation data at the conclusion. 2. Select one or two simple YES/NO, interesting questions to put respondent(s) at ease and gain interest. 3. Use primarily open-ended questions for the remainder of the interview/focus group. *Remember, you shouldn't use interview/ focus groups if your purpose is only to get brief answers to structured questions.* 4. List remainder of your tested questions in a logical sequence. • Cluster questions of like topics. • Sequence questions from general to specific. • Alternate tough and easy questions. • No sensitive questions at beginning or end. • Don't ask important questions at the end. • Collect demographics at the end as they are easy to answer and flag the end of the interview/focus group. 5. Avoid questions that almost always result in YES/NO answers or that evoke emotional responses. 6. Ensure your evaluation process will be ethical... Review the notes section of Task 1.1, Plan To Conduct Needs Assessment. 7. **STOP HERE if only doing interviews/focus groups.**

Table continued on next page.

Step 7 (cont.)

IF METHOD IS:	THEN:
Document/ Records Review.	1. List your questions/needs in a logical sequence that parallel the information sequencing in the document/ record(s) you are researching. 2. Use any data collection layout that is logical, well-organized, and relative to the way you work. • For instance, prepare your list of needs/questions on a two column worksheet similar to this decision table, where your questions/needs are in the left column and the right column provides a place to record your findings. • An alternative would be using word processing software while conducting this research. 3. Some documents you may want to review include: • Budget/financial statements. • Attendance rosters. • Trip reports. • Old evaluation reports. • Trade/industry publications. • MCCS Program guidelines etc. 4. **STOP HERE if only doing document/records reviews.**
Questionnaires.	1. Continue with Step 8 below.

NOTE:	Take advantage of the expertise in your Marketing Office for developing your evaluation.

DESIGN/LAYOUT WRITTEN QUESTIONNAIRES

Step 8 Lay out a DRAFT questionnaire using the guidelines from Task 1.2, Design/Develop Data Collection Instruments.

Step 9 Test your draft questionnaire.

- You tested and organized the evaluation questions in Steps 2 through Step 6. The purpose of this test is to check the utility, practicality, and reliability of the evaluation's design.

NOTE:	Refer to Task 1.2, Design/Develop Data Collection Instruments for further guidance.

Step 10 Revise the content of the questions, the format, and/or the layout of the evaluation as indicated by these tests.

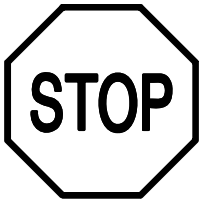
Step 11 Run a trial evaluation using the instrument with a sample group of six to ten potential respondents.

Step 12 Ask the people who will analyze the data to perform a trial run with responses from the trial evaluation.

- If you are using a computer for analysis, ask the data entry operator to make some trial entries. You may find the data supplied as you requested are difficult to analyze and that the evaluation structure and format must be revised.

Step 13 Revise as indicated.

Step 14 Proceed to Task 11.3, Collect Evaluation Data.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 11.0 - EVALUATE PROGRAM/ACTIVITIES/EVENTS

TASK 11.3

Collect Evaluation Data

DO THIS TASK WHEN

- You want/need to routinely:
  - Evaluate whether customer/patron needs or preferences are being met.
  - Determine whether the Command's or other leadership groups' MCCS program needs, preferences, or priorities are being met.
  - Determine if, and how, changes in the customer/patron base may affect (or is affecting) your Program.
  - Assess the potential impact of Program reductions, consolidations, changes, or elimination.
  - Determine customer/patron reaction to new/proposed major program activities/events.
  - Assess the impact, effectiveness, and execution of your activities, events, products, and services on a regular basis or at the time of delivery.
  - Assess customer/patron preferences, priorities, and/or opinions about your Program's activities, events, products, services, customer service, quality, value, etc.

REFERENCES

- Statistics, A Spectator Sport, Richard M. Jaeger, Sage Publications, Newbury Park, CA, 1990.
- Figuring Things Out, A Guide to Needs Analysis, Zemke & Kramlinger, Addison Wesley Publishing Co., Menlo Park, CA, 1982.
- The Practice of Social Research, Earl Babbie, Wadsworth Publishing, Belmont, CA, 1989.
- How To Conduct Organizational Surveys; A Step-By-Step Guide, J. Edwards, M. Thomas, P. Rosenfeld, S. Booth-Kewley, Sage Publications, Thousand Oaks, CA, 1997.
- The Practical Handbook and Guide to Focus Group Research, Thomas Greenbaum, Lexington Books, Lexington, MA, 1987.

SUPPLIES/ RESOURCES

- MCCS Managers' Desk Reference, Duty 1.0, Tasks 1.1 through 1.5.
- Personal computer with word processing software.
- Survey software.
- Forms design software.
- Sample evaluation surveys/questionnaires with data.
- Data collection instruments from Task 1.2, Design/ Develop Data Collection Instruments.

THIS TASK IS DONE CORRECTLY WHEN

- You have revised or developed an evaluation instrument that solicits data/information about your Program.
  - Impact.
  - Cost/benefit/value.
  - Quality.
  - Customer/patron satisfaction.
  - Customer service.
- You have collected a sufficient quantity of statistically valid data that reflects your customers'/patrons' Program needs, wants, preferences, priorities, and/or expectations.
- You have collected data that reflects the Command's or other leadership groups' needs, preferences, and priorities.

NOTES

To this point you have planned your evaluation and developed evaluation questions and instruments.

The next step is to actually go out and collect the information you need.

You may collect the information yourself, have others do the collecting, or do it as a team effort.

One of the methods many Program managers use to collect evaluation data and stay atop their Program is through unstructured interviews.

Data supporting your findings in all methods of evaluation are extremely important and become the basis for major Program decisions such as budget, programming, staffing, facility planning, etc. Therefore, it is important to fully document even the most "casual" of evaluations.

This task will address how the many methods of data collection can be used and benefit your Program.

Task 11.4, Analyze Data/Determine Appropriate Actions, will detail what to do with the data once collected.

PROCEDURE

Step 1 Review and revise as applicable, the plan of action and milestones (POA&M) that you prepared in Task 11.1, Develop Evaluation Plan for conducting an evaluation.

Step 2 Use the table below to locate the data collection steps that apply to the evaluation method(s) you chose in Task 11.1, Develop Evaluation Plan.

IF YOU SELECTED:	THEN:
Document Reviews.	Go to Step 3.
Interviews.	Go to Step 8.
Focus Groups.	Go to Step 20.
Questionnaires.	Go to Step 27.

DOCUMENT REVIEW METHOD

Step 3 Gather the documents that you identified in Task 11.1, Develop Evaluation Plan.

For example:

- Customer/patron comment cards.
- Activity/event evaluation data.
- Previous evaluations and assessment summaries.
- Attendance rosters.
- Product usage/check-out sheets.
- Trip reports.
- Local assessment reports.
- Marine Corps customer survey reports.
- Industry trend reports in various media such as trade publications, newspapers, books, magazines, and CD databases.
- Budget and financial statements.
- MCCS Division program guidelines.
- Other.

Step 4 Review each document for the information to answer the questions and/or locate data needs that you listed in Task 11.2, Prepare Evaluation Instruments.

Example questions/data needs:

- What is our current year-to-date (YTD) financial/operational performance?
- What are the specific details in Headquarters/Command instructions/ orders that apply to our playground equipment?
- What are the YTD participation figures for evening and afternoon league bowling?
- What customer/patron needs/desires/trends are indicated in the current Marine Corps MCCS customer service reports for our immediate commuting area?
- What are the industry trends regarding quick service/fast food menu items as compared to our menu offerings?

Step 5 Record your document review findings on either blank paper, a worksheet you prepared in Task 11.2, Prepare Evaluation Instruments, on cards like the example illustrated below, or in your own word processing/spreadsheet document.

Example:

Issue/Concern:	How much money, per person, is spent at the theater snack bar?
Documents Reviewed:	Movie attendance records. YTD financial statements for the theater snack bar. Product usage (scatter) sheets.
Findings:	$2.25 spent per customer/patron YTD. Top sellers were the value-priced, large popcorn and sodas.
Notes:	Movie companions probably share concession purchases.

Step 6 Continue to research and answer the questions and/or document your needs until you have exhausted all the question/needs that you listed in Task 11.2, Prepare Evaluation Instruments.

Step 7 Determine next data collection action.

IF YOU CHOSE:	THEN:
ONLY the Document Review method of data collection.	1. You are finished with this task. 2. Go to Task 11.4, Analyze Data/ Determine Appropriate Actions to analyze your findings.
Additional data collection methods: • Interviews. • Focus Groups. • Questionnaires.	1. Use the table in Step 2 to decide which additional steps to do now.

INTERVIEW METHOD

Step 8 Determine whether the interview(s) should be structured or unstructured.

IF YOU WANT:	AND:	THEN:
General opinions or answers about a variety of issues.	You **DON'T** want/need the responses to come from a specific group.	1. Conduct an unstructured interview. 2. Go to Step 9.
	You **DON'T** want/need the responses to be collected at a specific time/place.	
Focused opinions or answers about one or more specific issues.	You want to gather the responses from members of a specific group at a designated time/place.	1. Conduct a structured interview. 2. Go to Step 14.

UNSTRUCTURED INTERVIEW METHOD

Step 9 Interview targets of opportunity, such as:

- Eligible customers/patrons.
- Program activity/event participants during and after participation in an activity, event, service, or product purchase.
- Community members on the base. (E.g., "Gate Keepers", opinion leaders, officers of special interest groups, clubs, etc.)
- Passersby. This respondent can tell you why he/she IS a passerby--important program information.
- Staff members/MCCS colleagues/supervisors. These respondents will have valuable insights/opinions.
- Other.

Step 10 Ask the interview questions you prepared in Task 11.2, Prepare Evaluation Instruments.

For example, your planned interview questions might have been:

- Why do you use this facility?
- How often do you come here?
- What Program/facility changes would encourage you to use the facility more frequently?
- What services/products do you wish we offered?
- Was your experience a positive one? What did you like most/least?
- How would you describe the customer/patron service at this facility?
- Will you participate again?

Step 11 Record the respondent's answers/comments on a suitable recording medium.

- Blank paper and clipboard.
- Word processing/spreadsheet document.
- Audio recorder.
- Portable/laptop computer.

Example:

Question: Why do you use this facility?

Responses:
1. It's close to work.
2. The prices are great!
3. My friends come here.
4. I can walk here from the barracks.

Question: What activities do you participate in most often?

Responses:
1. Open bowling.
2. Lunch at the snack bar or a beer after work.
3. Video games.
4. Sunday's Red Pin Bowling.

Step 12 Continue conducting unscheduled interviews until you have exhausted all the questions you listed in Task 11.2, Prepare Evaluation Instruments and have data/information that you consider to be:

- Relevant to the information you are attempting to gather.
- Relevant to the critical area you are attempting to evaluate.
- Representative of the target population.
- Statistically valid.
- Quantifiable.
- In accordance with your original evaluation plan.

Step 13 Determine next data collection action.

IF YOU CHOSE:	THEN:
ONLY the UNSTRUCTURED interview method of data collection.	1. You are finished with this task. 2. Go to Task 11.4, Analyze Data/ Determine Appropriate Actions to analyze your findings.
To do STRUCTURED interviews in addition to the unstructured interviews you just completed.	1. Continue with Step 14 below.
Additional data collection methods in addition to the unstructured interviews you just completed: • Document Reviews. • Focus Groups. • Questionnaires.	1. Use the table in Step 2 to decide which additional steps to do now.

STRUCTURED INTERVIEW METHOD

Step 14 Schedule and prepare for the structured interview(s). (Refer to Task 1.7, Manage Meetings, Briefings and Presentations.)

Accomplish the following:

- ☐ Set a date, time, place for the interview(s).
- ☐ Schedule/reserve the interviewing area.
- ☐ Obtain necessary supplies:
  - Easel and flip chart paper.
  - Flip chart markers.
  - Masking tape.
  - Audio/visual (A/V) equipment if applicable.
- ☐ Prepare an agenda.
- ☐ Prepare letters asking for participation.
- ☐ Provide incentive for participating and include with the letter and agenda.
- ☐ Use the internet, e-mail, USPS, etc., to mail/distribute invitation letters, agenda, and incentive for the structured interview attached.
- ☐ If practical, confirm number of committed participants.

NOTE:	Structured interviews can be conducted by telephone also.

Step 15 Review the agenda, rehearse, and be prepared for the structured interview(s) beforehand.

Step 16 Conduct the structured interview(s) on the appointed day and at the scheduled time.

- ☐ Arrive ahead of time to set up interview area.
- ☐ Set up amenities, if applicable.
- ☐ Test A/V equipment, if applicable.
- ☐ Adjust lighting up and temperature down (not too far, but start cool, bodies generate heat fast in a small meeting/conference room).
- ☐ Set up flip chart(s) and other applicable visuals.
- ☐ Distribute materials, if any.
  - Calendar of activities/events and/or program plans.
  - List of fees, prices, and/or charges.
  - Promotional/publicity materials.
  - Vendor supplied advertisements/materials.
  - Standard operating procedures (SOPs).
  - Budget records.
  - Financial statements, etc.
- ☐ Start on time, stay on track, and end on time.

Step 16 (cont.)

☐ Ask your planned questions.

For example:

- What do you like most about us and why?
- What do you like least about us and why?
- When was the last time you used our facility?
- How much time do you spend with us each visit?

A. 0-60 minutes. B. 60-90 minutes.
C. 90-120 minutes. C. 120 minutes or more.

☐ Evaluate the interview process..., How well did you do?

Step 17 Record responses on any suitable recording medium.

- Blank paper and clipboard.
- Flip chart paper.
- Word processor/spreadsheet document.
- A/V recorder.
- Combinations of the above.

Example:

Question: What did you like most about the program?

Responses:
1. Prices are a lot less than out in town.
2. Convenient and easy to get to from the barracks.
3. Even on league nights, there are always lanes available for open bowling.
4. That you gave out the "bowl-free" coupon when I went through orientation.

Step 18 Continue conducting structured interviews until you have exhausted all the questions you listed in Task 11.2, Prepare Evaluation Instruments, and have data/information that you consider to be:

- Relevant to the information you are attempting to gather.
- Relevant to the critical area you are attempting to evaluate.
- Representative of the target population.
- Statistically valid.
- Quantifiable.
- In accordance with your original evaluation plan.

Step 19 Determine next data collection action.

IF YOU CHOSE:	THEN:
ONLY the Structured Interview method of data collection.	1. You are finished with this task. 2. Go to Task 11.4, Analyze Data/ Determine Appropriate Actions to analyze your findings.
Additional data collection methods: • Document Review. • Focus Groups. • Questionnaires.	1. Use the table in Step 2 to decide which additional steps to do now.

FOCUS GROUPS

Step 20 Schedule the focus group. (Refer to Task 1.7, Manage Meetings, Briefings and Presentations.)

Accomplish the following:

- ☐ Set a date, time, place for the focus group.
- ☐ Schedule the meeting area.
- ☐ To avoid biases and defensive behaviors, schedule an impartial facilitator.
  - Select someone other than yourself.
  - Use colleague, impartial/non-vested staff member, etc.
- ☐ Obtain necessary supplies:
  - Easel and flip chart paper.
  - Masking tape.
  - Flip chart markers.
  - A/V equipment if applicable.
- ☐ Prepare an agenda.
- ☐ Prepare invitation letters asking for participation.
- ☐ Provide incentive for participating and include with letter and agenda.
- ☐ Use the Internet, e-mail, USPS, etc., to mail/distribute invitation letters, agenda, and incentive for the focus group.
- ☐ If practical, confirm number of committed participants.
- ☐ Ensure facilitator reviews agenda, rehearses, and prepares to lead the focus group.

Step 21 Ensure the focus group is conducted on the appointed day and at the scheduled time.

Ensure the facilitator:

☐ Arrives ahead of time and sets up meeting area.

☐ Sets up amenities, if applicable.

☐ Tests A/V equipment, if applicable.

☐ Adjusts lighting up and temperature down (not too far, but start cool, bodies generate heat fast in a small meeting/conference room).

☐ Sets up flip chart(s) and other applicable visuals and ensures visuals can be seen throughout room.

☐ Distributes materials, if any.

- Calendar of activities events and/or program plans.
- SOPs.
- List of fees, prices and/or charges.
- Budget information.
- Promotional/publicity materials.
- Financial information.
- Vendor supplied advertisements/materials, etc.

☐ Asks planned questions.

For example:

- What do we do in the Children and Youth Program that positively excites you and your children?
- What direction would you like to see the Program go?
- How can we better communicate with you?
- In what areas do we need to improve?
- Why are those areas important to you?

☐ Starts on time, ends on time, and keeps focus group on track.

Step 22 Ensure the focus group facilitator records responses on suitable recording medium.

- Flip chart paper.
- A/V recorder.
- Blank paper and clipboard.
- Word processor/spreadsheet document.
- Combinations of the above.

Example:

Question: What do we do in the Children and Youth Program that positively excites you and your children?

Responses:

1. The staff takes a genuine interest in the children. The children and parents are called by name. Personal events, such as birthdays, a new tooth, and even report cards are celebrated.
2. The activity calendars are attractive, innovative, and exciting to read. They grab your attention and make you want to find out more about the activities and events.
3. Holiday activities and social events like the dances and bike rodeo are pretty neat.
4. Not so sure about the kids, but we parents like the after-school home work time that you make available for those who need it.

Step 23 Ensure the focus group facilitator evaluates the session(s).

- ☐ Were the group reactions positive, neutral or negative and why?
- ☐ Did results achieve the purpose of the focus group? Why/Not?
- ☐ Did the facilitator accomplish his/her assignment? Why/Not?
- ☐ Did the planned questions provide precise, representative, quantifiable, statistically valid information? Why/Not?
- ☐ Was the meeting area suitable? Why/Not?
- ☐ What would you do differently and why?
- ☐ What would you repeat? Why/Not?

Step 24 Revise the focus group outline, plan, and/or, questions as indicated by the post-focus group evaluation.

Step 25 Continue the scheduled focus group meetings, if more than one scheduled, until you have exhausted all the questions you listed in Task 11.2, Prepare Evaluation Instruments, and have data/information that you consider to be:

- Relevant to the information you are attempting to gather.
- Relevant to the critical area you are attempting to evaluate.
- Representative of the target population.
- Statistically valid.
- Quantifiable.
- In accordance with your original evaluation plan.

Step 26 Determine next data collection action.

IF YOU CHOSE:	THEN:
ONLY the Focus Group method of data collection.	1. You are finished with this task. 2. Go to Task 11.4, Analyze Data/ Determine Appropriate Actions to analyze your findings.
Additional data collection methods: • Document Review. • Interviews. • Questionnaires.	1. Use the table in Step 2 to decide which additional steps to do now.

QUESTIONNAIRE

Step 27 Choose how the questionnaire you prepared in Task 11.2, Prepare Evaluation Instruments, will be administered/distributed.

For example:

- ☐ USPS.... (ALWAYS include method to return questionnaires).
- ☐ Base distribution system.
- ☐ Facility handouts.
- ☐ Door-to-door handouts on the base.
- ☐ Internet, e-mail, etc.
- ☐ Other.

Step 28 Coordinate administrative and logistical requirements to accomplish your evaluation questionnaire per your POA&M.

For example:

- Coordinate with marketing/admin for data processing, if data is to be administered, managed and analyzed using survey, statistical, spread-sheet, or database software.
- Schedule staff and/or volunteers to distribute & collect.
- Schedule staff and/or volunteers to open and pre-sort if indicated by size of questionnaire and/or number of questionnaires completed.
- Schedule word processing assistance.
- Recruit sample target population for testing the evaluation questionnaire.
- Make sufficient copies of your evaluation questionnaires for testing purposes.

Step 29 Administer the questionnaire.

- Mail/route the questionnaires.
- Receive/collect the questionnaires.
- Set up computer.

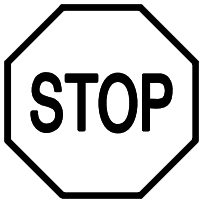
NOTE:	Task 11.4, Analyze Data/Determine Appropriate Actions provides step-by-step guidance on what to do with your collected data/info.

Step 30 Administer questionnaires until you have received enough data/information that you consider to be:

- Relevant to the information you are attempting to gather.
- Relevant to the critical area you are attempting to evaluate.
- Representative of the target population.
- Statistically valid.
- Quantifiable.
- In accordance with your original evaluation plan.

Step 31 Determine next data collection action.

IF YOU CHOSE:	THEN:
ONLY the Questionnaire method of evaluation.	1. You are finished with this task. 2. Go to Task 11.4, Analyze Data/ Determine Appropriate Actions to analyze your findings.
Additional data collection methods: • Document Review. • Interviews. • Focus Group.	1. Use the table in Step 2 to decide which additional steps to do now.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 11.0 - EVALUATE PROGRAM/ACTIVITIES/EVENTS

TASK 11.4

Analyze Data/Determine Appropriate Actions

DO THIS TASK WHEN

- You have collected evaluation responses from your target population(s). (E.g., customers/patrons, Command, other leadership groups, etc.)
- You have gathered data about your Program from your document review.
- You have completed Tasks 11.1 through 11.3.

REFERENCES

- Statistics, A Spectator Sport, Richard M. Jaeger, Sage Publications, Newbury Park, CA, 1990.
- The Practice of Social Research, Earl Babbie, Wadsworth Publishing, Belmont, CA, 1989.
- Figuring Things Out, A Guide to Needs Analysis, Zemke & Kramlinger, Addison Wesley Publishing Co., Menlo Park, CA, 1982.
- How To Conduct Organizational Surveys; A Step-By-Step Guide, J. Edwards, M. Thomas, P. Rosenfeld, S. Booth-Kewley, Sage Publications, Thousand Oaks, CA, 1997
- R.A.W. Test Procedure, Marine Corps MCCS Managers' Desk Reference, Vol. 1, Task 1.4, Analyze Data/Draft Needs List (Conduct R.A.W. Tests), Personal and Family Readiness Division (MRG).

SUPPLIES/ RESOURCES

- Worksheets, notes, data, and evaluation forms, questionnaires, or instruments developed in Task 11.1, Develop Evaluation Plan; Task 11.2, Prepare Evaluation Instruments; and Task 11.3, Collect Evaluation Data.
- Detailed activity plan for the activities, events, products, and services you are evaluating.
- Computer with survey/analysis software.
- MR MCCS Program guidelines/standards.
- Calculator and typical office supplies.
- Industry trends/processes.

THIS TASK IS DONE CORRECTLY WHEN

- You have prepared a list of problems, concerns, and unmet needs experienced by your customers/patrons, the Command, and other leadership groups.
- You have prepared a list of successes/positive accomplishments that have met the wants, needs, preferences, priorities, and expectations of your Program's customers/patrons, the Command, and other leadership groups.
- You have used the evaluation data to develop solutions that will close the gap between expressed needs, preferences, or priorities and what was actually accomplished.
- Your solutions have passed your assessment that each is **R**ealistic, **A**chievable and **W**orth accomplishing. (Passed the R.A.W. Test.)

NOTES

WHERE YOU ARE IN THE ASSESSMENT PROCESS

Having completed Tasks 11.1 through 11.3, you now have a certain amount of customer/patron feedback, attitudes, evaluation and other information about their opinions, feelings, reactions, and assessments about your Program's activities, events, products and services.

This task will help you with four analysis procedures:

(1) To organize and analyze your data into a list of MCCS program needs/preferences not being met.

(2) To delete individual needs/preference responses due to low response frequencies or invalid responses.

(3) To develop solutions that will close the gap between expressed needs and preferences and what was actually accomplished.

(4) To evaluate each remaining need/preference as being **R**ealistic, **A**chievable, and **W**orth (RAW) accomplishing.

WHY DATA ANALYSIS IS IMPORTANT

Data is subject to various interpretations. Because your data may be coming from many different sources, the possibility of a variety of interpretations is obvious. You can expect different age or interest groups to have widely different "needs" and "preferences".

Therefore, you must carefully analyze the data to get the most accurate picture of whether you are meeting the needs/ preferences of your customers/patrons and Command/ leadership groups.

NOTES (cont.)

AUTOMATING YOUR DATA ANALYSIS

The advent of low-cost, high-power computers has vastly improved the time consuming, tedious, and often confusing process of tallying, sorting, tabulating, analyzing, and reporting evaluation data.

We encourage you to investigate the analytical/survey software programs available. You and your colleagues may be able to put such software to a variety of good uses which include conducting needs assessments, program/event evaluations, customer/patron satisfaction surveys, and more.

Your Marketing Office and other installation offices may have the expertise and resources to tally, sort, tabulate, analyze, and report survey data as well as assist you with other evaluation processes.

PROCEDURE

SORT/ORGANIZE EVALUATION RESULTS

Step 1 Review and discard any invalid data.

Some reasons for invalid data include:

- Incomplete answers, questionnaires, etc.
- Illegible answers, questionnaires, etc.
- Questions answered in obvious jest or other useless manner.
- Evaluation instructions misunderstood/ignored.
- Collection boxes stuffed.
- Response data manipulated.

NOTE:	Do **NOT** discard data simply because you don't like or disagree with the responses. If too many of your results are invalid, stop collecting data. Examine the data collection plan, instrument, and methods to determine what might have gone wrong. Make repairs, change plans, etc., then start collecting new data.

Step 2 Decide if you need to conduct additional evaluations.

IF YOUR NUMBER OF IN-HAND, USEABLE EVALUATIONS ARE:	THEN:
Equal to or greater than the sample size you selected in Task 11.1, Develop Evaluation Plan.	Continue with Step 3.
Less than the sample size you selected in Task 11.1, Develop Evaluation Plan.	Collect additional data. (Refer to Task 11.3, Collect Evaluation Data.)

Step 3 Decide how to separate your data.

IF YOU USED:	THEN:
ONLY one evaluation method.	Continue with the Step 4.
MORE than one evaluation method.	1. Sort the collected data into groups by the evaluation methods used: • Document Reviews. • Interviews. • Focus Groups. • Questionnaires. 2. Complete all the steps below for each type method before moving on to the next. (E.g., complete your analysis of all document review data before starting an analysis on your focus group data, etc.)

Step 4 Sort your data into related groups/critical areas.

☐ Use data separations/groupings applicable to the purpose of your local evaluation survey and the data you collected.

For example, you could group the data into groups, needs, preferences or critical areas like these:

- Rank groupings... such as:
  - E1-E3
  - E4-E6
  - E7-E9
  - W1-W5
  - O1-O4
  - O5-Higher
- Residence locations... such as:
  - on-base housing
  - barracks
  - private residence
  - off-base government housing
  - ship
  - other
- Age groupings... such as:
  - youth (6-12)
  - young adults (18-25)
  - teens (13-17)
  - adults (30-40)
- Critical areas of activities, events, products, and services ...such as:
  - services
  - facilities
  - types of special events
  - equipment
  - programs
  - hours of operation
- Program participation... such as:
  - full-time child care
  - pre-school
  - part-time child care
  - drop-in care
- Other... (based on the goal/purpose of your assessment).

NOTE:	You are trying to get a big confusing pile of information reduced to several smaller, more manageable piles. By design, your evaluation instrument may have accomplished much of this sorting, leaving you faced with simple tallying chores. For instance, you may have ONLY surveyed E-1s through E-4s living in the barracks.

Step 5 Tally the evaluation responses.

☐ By sorts/selected groupings.

☐ Review and tally one manageable pile/grouping at a time.

- Although this process is tedious, it is paramount to the completion of this task.
- If you have access to analysis software, your ability to tabulate and cross-tabulate is significantly enhanced, and the time consuming manual chores are comparatively reduced. Follow the data entry and processing instructions appropriate to the software application being used.

☐ Record on tally cards as shown in the example below, on a computer, or on a blank copy of the survey instrument itself. (See example on next page.)

Example:

Question: What golf activities or services have you participated in or used during the previous 6 months? (Select all that apply.)

	Responses Items	Tally	Tot
Responses:	1. Tournaments		20
	2. Lessons		10
	3. Club/equip repair		13
	4. Driving range		32
	5. Other:		NA
	• Handicapping service		12
	• Club Banquets		08
Totals:			95

SAMPLE

SAMPLE OF A SURVEY INSTRUMENT USED AS A TALLY SHEET

3. In which recreation/leisure activities do you prefer to participate? Check as many that apply. Add others if applicable.

   a. Outdoor activities:

17	☐	Archery 24%	11	☐	Paint ball 15%	34	☐	Softball 48%
27	☐	Biking 38%	9	☐	Rappelling 13%	26	☐	Surfing 37%
19	☐	Camping 27%	12	☐	Rock climbing 17%	47	☐	Swimming 66%
18	☐	Canoeing 25%	29	☐	Roller Blading 41%	33	☐	Tennis 46%
36	☐	Flag football 51%	14	☐	Run in 10K 20%	36	☐	Volleyball 54%
20	☐	Golf 28%	13	☐	Sailing 18%	21	☐	Walking 30%
19	☐	Hiking 27%	13	☐	Scuba diving 18%	19	☐	Water skiing 27%
7	☐	Horseback riding 10%	7	☐	Skeet shooting 10%	13	☐	White water rafting 18%
25	☐	Jet skiing 35%	14	☐	Snow skiing 20%	19	☐	Wind surfing 27%
18	☐	Mountain biking 25%	20	☐	Soccer 28%			

(23) ☐ Other:

71 VALID RESPONSES FROM YOUNG ADULTS SURVEYED ON 3/XX.

7 - ORIENTEERING - 10 %

14 - RACQUET BALL - 20 %

2 - HANG GLIDING - NA

SAMPLE

Step 6 Strike through those needs/preferences with low tallies.

- This needs to be a data-based action using the following method:
  - How many respondents indicated this need or preference?
  - In which groups are these respondents located?
  - How large a group percentage of responses does this represent?

NOTE: Be careful with this calculation--don't mix plums and potatoes. If 10 of 50 in a total group surveyed indicate a particular need/preference, then a 20% response may NOT justify action, implementation, change, etc. (10 ÷ 50 = 20%.)

On the other hand, a much lower percentage response could indicate a need worthy of further consideration. For instance, 10 responses from 175 total respondents would seem insignificant, until further sorting and examination revealed that the 10 responses all came from teens which represented a majority of that age group--a low response worthy of consideration.

Statistically, needs responses below 10% usually warrant no further consideration; response percentages between 10% and 25% need additional facts; and responses greater than 25% warrant consideration.

Other questions you should answer include:

- What response frequency will impact maximum participant satisfaction and/or program success?
- What response frequency will NOT provide a return on investment (ROI)?
- At what response frequency will you consider a *no cost* need/ preference?
- What response frequency for a Command priority will be included for further consideration?

When deciding what needs/preferences to further consider you may want to develop specific criteria relative to your Program/activity/event for evaluating what response frequency is *high enough* to promote maximum participant satisfaction and ensure program/activity/event success.

EXAMINE NEEDS/PREFERENCES

Step 7 Sort responses into categories of positive, neutral, negative, other, and not applicable (NA).

NOTE:	Positive	-	Exceeded need/expectations.
	Neutral	-	Met needs/expectations.
	Negative	-	Did not achieve/meet needs/expectation.
	Other	-	Unmet customer/patron need/preference.
	NA	-	Not applicable.

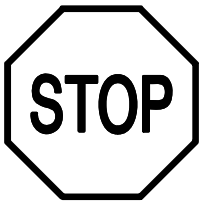
Step 8 Decide action to take on the responses in each of the categories.

IF:	THEN:
Positive.	1. Recognize, reward, advertise, accentuate, implement, publicize. 2. **STOP.**
Neutral.	1. Reinforce, maintain status quo. 2. **STOP.**
Negative.	1. Go to next step.

Step 9 Determine action on negative response.

IF:	THEN:
Problem can be resolved quickly, cost effectively, achievable and worth it. (Fast R.A.W.)	1. Take immediate action to fix the problem. 2. Record on detailed activity plan and/or your short/long-term plan for future reference. 3. Record in your daily planner/to-do-list.
Problem cannot be resolved quickly and/or cost effectiveness is not readily apparent. (Full R.A.W.)	1. Apply full R.A.W. Test to your solution. 2. Make necessary changes to your Detailed Activity Plan. 3. Make changes to your facility, staffing, budget, short/long-term plans.

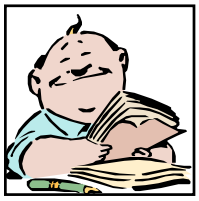
NOTE: See Task 1.4, Analyze Data/Draft Needs List (Conduct R.A.W. Tests).



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 11.0 - EVALUATE PROGRAM/ACTIVITIES/EVENTS

TASK 11.5



Prepare Evaluation Summary

DO THIS TASK WHEN

- You have completed an evaluation/survey and analysis of your entire MCCS Program, or specific activities, events, products, or services.
- You have completed an evaluation/survey and analysis of specific performance elements/aspects of your Program. (E.g., customer service, quality, cost, benefit/value, efficiency, effectiveness, specific customer/patron preferences/priorities, etc.)
- You need to provide a report/briefing on your Program, or specific Program activities, events, products, or services.
- You need to provide a report/briefing on specific performance elements/aspects of your Program. (E.g., customer service, quality, cost, benefit/value, efficiency, effectiveness, specific customer/patron preferences/ priorities, etc.)
- You want to gain support for decision(s)/recommendation(s) which will affect your Program or its activities, events, products, or services.

REFERENCES

- Recreation Programming; Designing Leisure Experiences, Rossman, Sagamore Publishing, Champagne, IL, 1989.
- How To Conduct Organizational Surveys; A Step-By-Step Guide, J. Edwards, M. Thomas, P. Rosenfeld, S. Booth-Kewley, SAGE Publications, Thousand Oaks, CA, 1997.
- The Practice of Social Research, Earl Babbie, Wadsworth Publishing, Belmont, CA, 1989.

SUPPLIES/ RESOURCES

- Evaluation summary form.
- Evaluation/survey forms and data.
- MCCS Managers' Desk Reference, Duty 1.0, Tasks 1.1 through 1.5.
- MCCS Managers' Desk Reference Task 9.2, Prepare Correspondence.
- The results of completing Tasks 11.1 through 11.4.
- Computer and survey/analysis software.
- Detailed Activity Plans.
- Short/long-term (5-Year) program management plans.
- Your things-to-do list.

THIS TASK IS DONE CORRECTLY WHEN

- You have prepared and distributed an evaluation summary that includes the following:

  - Name of the MCCS Program or activity, event, product, and service evaluated/surveyed.
  - Purpose of the evaluation/survey.
  - Method(s) of evaluation used and why.
  - When and how many times the evaluation/survey was conducted (or surveys distributed/mailed and returned).
  - Where the evaluation/survey was conducted and/or what populations were surveyed.
  - Target audience(s) surveyed and why.
  - Who conducted/assisted in the evaluation.
  - Explanations of data collections and reliability.
  - How anonymity was assured, if applicable.

- The evaluation summary details the critical areas evaluated and the results of the customer/patron input and documentation.

- The evaluation summary details action taken, pending, delayed or proposed.

- The evaluation summary includes necessary data, information, and/or justification to support changes to the Program or its activities, events, products, services, staff, resources, equipment, machinery, vehicles, supplies, facilities, etc.

  This data/information may include:

  - Financial results/needs.
  - Attendance/participation numbers.
  - Potential for future participation.
  - Value of the activity, event, product, and service to the customers/patrons, etc.

NOTES

Evaluation summaries are very useful to you and other decision makers in your Command.

They can be used to obtain support from your immediate supervisor, MCCS Director, Command, higher authority, and the community to affect/authorize change to your Program or its activities, events, products, or services.

You will also be able to use the summary to publish the results to your customers/patrons.

Review the ethics information in Task 1.1. Regardless of the results, report what your discovered--don't embellish, misrepresent, diminish, or ignore important results.

PROCEDURE

Step 1 Prepare summary document information with the name of the MCCS Program or the activity, event, product, or service evaluated/surveyed. (See Evaluation Summary Form starting on page 11.5.11.)

Step 2 Summarize the purpose or focus of the evaluation/survey.

NOTE:	Explain/summarize what you were attempting to discover or substantiate.

Step 3 List and briefly explain the method(s) of evaluation/document research used and why each method was selected for this evaluation/survey.

- You may want to include a copy of the survey instrument or a list of the questions as an enclosure to the summary.

Step 4 List when and how many times the evaluation was conducted or how many surveys were distributed and returned.

Step 5 List where the evaluation was conducted and to what target-populations surveys were distributed/mailed, if applicable, and why.

Step 6 Describe the target population (focus) of the evaluation/survey and why.

Step 7 List who conducted and assisted in the evaluation/survey.

Step 8 Reinforce any initial anonymity promises and what was done with the collected data/information.

NOTE:	Do NOT publish findings that in any way violate your respondent's privacy and anonymity. Do NOT publish any findings that will embarrass or single out specific individuals, groups, or other demographics of your data/information collection.

NOTE: The next four steps have you list those actions already taken; those you plan to take; those that need to be delayed; and those you will not take based on the results of your evaluations/surveys.

The results of evaluations/surveys can result in any of the following:

- No action required.
- Reinforce current staff performance.
- Acknowledge customer/patron satisfaction with current Program and/or your activities, events, products, services, fees, prices, charges, hours of operation, equipment condition, quality, and availability, etc.
- Initiate immediate low/no-cost changes in the way of maintenance, procedures, supplies, staff behavior, etc.
- Additions, deletions, changes to current activity/event programming/scheduling.
- Changes in policy, fees, prices, charges, hours/days of operation.
- Need for long term planning to acquire major equipment items, significant renovations, new facilities, additional staff, new staff skills/knowledge, etc.
- Delayed actions awaiting authority, waiver, additional/reprogrammed funds.
- Temporarily delayed actions awaiting minor/local approvals, funding, acquisitions, modifications, deliveries, set-up, etc.

Step 9 List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the **"Positive"** and **"Neutral"** responses.

Step 10 List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the **"Negative"** responses.

Step 11 List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the **"Other"** responses.

Step 12 List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the **"Write-In"** or **"Open-Ended"** responses.

Step 13 Route your initial summary for review and approval to your immediate supervisor.

IF:	THEN:
NOT approved as submitted.	1. Revise or reclama/discuss. 2. Resubmit for review and approval.
Approved as submitted.	Continue with Step 15.

Step 14 Record any other appropriate notes, findings, opinions, etc., in your evaluation summary.

Step 15 Route and file the finalized evaluation summary per local chain of command routing procedures.

- ☐ Your staff.
- ☐ Your immediate supervisor.
- ☐ MCCS Director.
- ☐ Command and/or higher authority.
- ☐ Copy to your files for future reference.

Step 16 Initiate applicable management actions that result from your evaluations/ surveys.

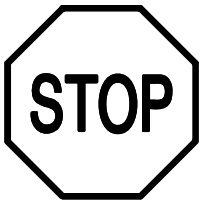
These actions may include:

- ☐ Train, develop, reorganize staff.
- ☐ Modify current activities, events, products, and/or services.
- ☐ Change operational policy/procedures.
- ☐ Initiate purchases/contracts.
- ☐ Initiate facility, equipment, vehicle, grounds maintenance, renovation, repair, replacement, etc.
- ☐ Begin processes to acquire major new or replacement assets.
- ☐ Begin processes to acquire new facilities and/or accomplish major renovations.

Step 17 Record planned management actions/decisions/initiatives in whatever planning documents you use appropriate to the actions/decisions/initiative.

- Program goals and objectives.
- Short/long-term (5-Year) program management plan.
- Daily things-to-do list.
- Tickler files/database.
- Detailed activity plans.

Step 18 Publicize results of your evaluations/surveys and upcoming actions.



Congratulations! You've completed this task.

EVALUATION SUMMARY
Page 1 of 3

1. Name of MCCS Program or activities, events, products, and/or services evaluated/surveyed.

_____

_____

2. Purpose/focus of this evaluation/survey.

_____

_____

3. Method(s) of evaluation/document(s) used and why.

_____

_____

4. When and how many times the evaluation/survey was conducted or how many surveys were distributed/mailed and returned?

_____

_____

5. Where was the evaluation/survey conducted and to what target-populations surveys were distributed/mailed, if applicable, and why?

_____

_____

6. Describe the target population (focus) of the evaluation/survey and why.

_____

_____

EVALUATION SUMMARY
Page 2 of 3

7. List who conducted/assisted in the evaluation/survey.

_____

_____

8. How were initial anonymity promises, if any, honored, and what was done with the collected data/information.

_____

_____

9. List the action(s) taken/not taken/delayed on the “Positive” and “Neutral” responses/feedback for the activities, events, products, or services being evaluated.

_____

_____

_____

_____

_____

_____

10. List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the “Negative” responses.

_____

_____

_____

_____

EVALUATION SUMMARY
Page 3 of 3

11. List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the “Other” responses.

_____

_____

_____

_____

12. List the action(s) that have been taken, those that will NOT be taken, and/or those that will be delayed on the “Write-In” or “Open-Ended” responses.

_____

_____

_____

_____

13. Routing/distribution requirements:

_____

_____

14. Other/Notes:

_____

_____

_____

_____

Summary completed by: _____ Date: _____

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD AND BEVERAGE OPERATIONS

WHAT THIS DUTY DOES

The customer's/patron's perception of your Program depends on many things. Most significant among these are quality, perceived value, and customer service.

Extraordinary customer service, customer-driven product selection, reasonable pricing, consistently prepared products, dependable service and efficient operations project an image of a well-run program and are vital in meeting your Program's goals.

Whereas the first eleven duties in this desk reference set address the operational and business aspects of all MCCS Programs, this Duty is designed to help you identify your customer's/patron's food and beverage preferences, establish appropriate fees and prices, ensure safe and efficient operations, and control costs.

This Duty provides guidance on the following Tasks:

12.1 Provide Customer Menu and Service Preferences.

12.2 Ensure Safe Food Handling and Storage.

12.3 Ensure Efficient Food Production Service.

12.4 Control Food Costs.

12.5 Select Bar Stock/Standardize Drink Recipes.

12.6 Control Beverage Costs.

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD and BEVERAGE OPERATIONS

TASK 12.1

Provide Customer Menu and Service Preferences

DO THIS TASK WHEN

- Establishing a new food operation.
- Changing a current food operation to increase sales/ profit and/or to reduce costs.
- Accomplishing a business downsizing or consolidation.
- Experiencing or anticipating a significant change in the customer/patron demographics that is affecting or may affect the Program.

REFERENCES

- MCO P1700.27A (series), MCCS Policy Manual.
- Planning and Control for Food and Beverage Operations, Jack D. Ninemeier, Ph.D., CHA, Educational Institute of the American Hotel & Lodging Association, Lansing, MI, 5th edition, 2001.
- NAVMC 2913 (series), Food and Hospitality Operations Manual.

SUPPLIES/ RESOURCES

- Data collection instruments. (E.g., questionnaires, focus group data, and/or survey software.)
- Current menu and customer service preference information/data.
- Current menus.
- Scatter sheets.
- Menu analysis data.
- Menu engineering information.
- Financial data including sales and cost of operations/ goods.
- General office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Your business decisions are based on valid, up-to-date needs/preference data gathered by questionnaires, document reviews, interviews, focus groups, etc., from your current and potential customers/patrons and other applicable stakeholders.
- Menu selections are regularly reviewed, revised, and replaced, thereby providing customers/patrons with new, different, interesting, up-to-date, customer-preferred and industry-driven products and services.
- Menu selections, daily operations, staff knowledge, and staff behavior meet or exceed customer/patron expectations.

NOTES

In some cases, customers/patrons choose to eat at a specific establishment because it offers one or more unique products that satisfy their needs at a particular time of day. Often, the establishment just happens to be in the right location at the right time. And most often, according to customer loyalty research, providing *world class customer service* brings them back!

Selecting menu items is without question, a critical part of any food operation. The steps in this Task, Provide Customer Menu and Service Preferences apply to quick service food operations. While the scope of your food operation may differ, the importance of selecting appropriate menu items ***based on customer/patron preferences*** is key to sales and to your reputation via word-of-mouth referral.

Since business success depends on consistently providing customers/patrons with products and services *they* want, it is both logical and important that they have input about the selection of menu items.

The procedures and formulas used in this Task can be used in other food service operations, too. (E.g., casual family, catering, etc.)

While information from your *current* users is important, collecting data from only them limits the information you need to make good business decisions. You also need information from those who are NOT using your facility--and why.

We have included a sample, menu-specific survey in this Task for information purposes only.

In addition to the menu-selection steps in this Task, all of the Tasks in Duty 1.0, Assess Needs will help you identify customer/patron needs, preferences, opinions and perceptions.

NOTES (cont.)

Your local marketing department should be able to help you set up and administer hard copy and electronic surveys and questionnaires; develop and distribute data collection instruments appropriate to your operation; and collect, compile, analyze, and interpret the customer/patron demographics and preference data.

Customer/patron preference data can be obtained from:

- Staff knowledge of customer preferences, patterns, and habits.
- Historical sales data, financial statements, etc.
- Focus groups, face-to-face surveys, and phone surveys.
- Electronic and hard copy, mail-out questionnaires/ surveys and comment cards.
- Industry trends, data and related information.

The return rate of questionnaires/surveys is typically improved by offering incentives for completing and returning the Customer/Patron Surveys. (E.g., small gifts, discount coupons, etc.)

Marine Corps Community Services (MCCS) food service operations are designed to accomplish various missions. Some are catering businesses; some are generic, locally designed quick service operations; some are "branded" / "licensed" quick service operations; and some are full service, restaurant, beverage and entertainment operations.

While the focus of this Task is on the generic, quick service operation, all types of food, beverage and entertainment businesses will benefit by applying the management, supervisory, and operational guidance provided in this desk reference set.

NOTES (cont.)

The menu items below are those that the quick service food industry and the MCCS recommend as "*basic, typical and profitable*" to quick service food operations. The steps in this Task are based on this list. At least 80% of your quick service menu should come from this list. The menu items for other food service businesses will be different.

Quick Service Menu Items	
Salads/Soups: ☐ Chef Salad ☐ Chicken Salad ☐ Grilled Chicken Breast Salad ☐ House Salad ☐ Tuna Salad ☐ Caesar Salad ☐ Chicken Noodle ☐ Broccoli and Cheese ☐ Vegetable Beef ☐ Minestrone ☐ Clam Chowder ☐ Chili	**Grilled/Hot Sandwiches:** ☐ BBQ Beef or Pork Sandwich ☐ Fish Sandwich ☐ Grilled Chicken Sandwich ☐ Hamburgers (variety) ☐ Hot Dogs (variety) ☐ Meatball Sub ☐ Philly Cheese Steak ☐ Rueben Sandwich ☐ Steak Sandwich ☐ Grilled Cheese Sandwich
Subs/Deli Sandwiches: ☐ BLT Sandwich ☐ Club Sandwich ☐ Ham & Cheese Sub ☐ Italian Sub ☐ Tuna Sub ☐ Turkey Sub	**Miscellaneous:** ☐ Chicken Tenders ☐ Popcorn Shrimp ☐ Pizza ☐ Nachos ☐ Hot Wings
Sides: ☐ Cole Slaw ☐ French Fries (variety) ☐ Onion Wings	**Breakfast:** ☐ Egg Sandwiches (variety) ☐ Pancakes ☐ Bagels ☐ Hash Browns

NOTES (cont.)

This task has two parts:

1. **Identifying Customer Preferences.** Steps 1 through 21 ensure you provide identifiable/recognizable quality brands/products.

2. **Meeting Customer Expectations.** Steps 22 through 25 ensure you give your customers/patrons what they expect every time they order.

USMC ASSISTANCE

Headquarters U.S. Marine Corps (MRK) Community Services, Personal and Family Readiness Division, Food and Hospitality Branch is available to assist you with all phases of menu/recipe development at MCCS operations.

NAVY ASSISTANCE

The Navy Morale, Welfare, and Recreation (MWR), Business Activities Branch, (N222) is available to assist you with standardizing your food operation.

Their assistance includes menu development and display, production and service line design, operational and administrative management, and on-the-job training.

Standardized menu packages such as pizza, deli, grill, oriental, barbecue, rotisserie, Mexican, "blue plate", coffee program, and other "branded" concepts are available.

PROCEDURE

IDENTIFYING CUSTOMER PREFERENCES; Steps 1 through 22

Step 1 Collect data to identify your customer's/patron's menu-item-preferences, spending habits, and service expectations.

> **NOTE:** Refer to Task 1.2, Design/Develop Data Collection Instruments for guidance on preparing and administering questionnaires/surveys The first five Tasks in Duty 1.0, Assess Needs thoroughly cover how to prepare for and conduct a Needs Assessment.
>
> Before administering the survey, ensure its data will enable you to make appropriate menu selections and other appropriate business decisions. There's no sense asking questions when you either can't understand, or do nothing with the answers.

☐ Distribute surveys to key department heads and stakeholders. Ask that they distribute the surveys to *randomly selected* authorized customers/ patrons. (See Task 1.1, Plan To Conduct Local Needs Assessment for information about random/representative sampling.

☐ Start with a minimum distribution of 100 questionnaires/surveys. (If your customer base is very small, survey 100% of the customers.)

> **NOTES:** The sample survey on pages 12.1.9 through 12.1.11 is for demonstration purposes only. Your questionnaire/survey instrument will probably be different. It should be designed to collect data relevant to your customer's/patron's **quick service** food and service preferences.
>
> Your customers/patrons will have definite opinions about speed of service, hours of operation, cleanliness, price/value, etc. Their preferences and opinions may significantly influence your menu selections, customer service practices, and daily operations.
>
> **Example:** If your data indicates that *waiting more than five minutes for a food item is unacceptable* then food items taking more than 5 minutes to prepare and serve should not be included in your menu choices.
>
> Task 4.2, Ensure Extraordinary Customer Service provides extensive customer service information and guidance and should be completely reviewed and used for all MCCS Programs.

FOOD OPERATION
CUSTOMER/PATRON SURVEY

Activity _____ Date _____

Thank you for taking the time to complete this survey. The information you provide will help us develop menus, methods, policy, and service practices to accommodate your needs, preferences, and expectations. **Your responses will remain confidential.**

Check the one most appropriate response in questions 1-9 below:

1. On the average, how often do you eat at this facility?

   ☐ Once a week ☐ Once a month
   ☐ 2 times a week ☐ 2 times a month
   ☐ 3 plus times a week ☐ 2-3 times a year

   Why? _____

   _____

2. How do you rate the food quality?

   ☐ Great ☐ Good ☐ Poor
   ☐ Very Good ☐ Average ☐ Terrible

3. After placing an order, how quickly do you expect to receive your food?

   ☐ 1-3 minutes ☐ 5-7 minutes ☐ 10 + minutes
   ☐ 3-5 minutes ☐ 7-10 minutes

4. How long does it usually take to receive your order, after ordering?

   ☐ 1-3 minutes ☐ 5-7 minutes ☐ 10 + minutes
   ☐ 3-5 minutes ☐ 7-10 minutes

5. When you arrive, are you greeted in a genuine, friendly, cheerful, and courteous manner?

   ☐ Always ☐ Sometimes ☐ Never
   ☐ Usually ☐ Seldom

SAMPLE

CUSTOMER/PATRON SURVEY (cont.)

6. Based on personal experience and/or observation, are customer/patron concerns or complaints handled courteously?

☐ Always ☐ Sometimes ☐ Never
☐ Usually ☐ Seldom ☐ Don't Know

7. Is the quality of the food products that you order consistent each time? (E.g., taste, temperature, appearance, portion/amount, etc.)

☐ Always ☐ Sometimes ☐ Never
☐ Usually ☐ Seldom

8. How do you rate the appearance and the cleanliness of the facility?

APPEARANCE:
☐ Great ☐ Average
☐ Good ☐ Poor

CLEANLINESS:
☐ Great ☐ Average
☐ Good ☐ Poor

9. Do the staff members perform their jobs with knowledge and confidence?

KNOWLEDGE:
☐ Always ☐ Seldom
☐ Usually ☐ Never
☐ Sometimes ☐ Don't Know

CONFIDENCE:
☐ Always ☐ Seldom
☐ Usually ☐ Never
☐ Sometimes ☐ Don't Know

10. Check your TOP TWO favorites for EACH food category below:

Breakfast:
☐ Egg Sandwiches ☐ Bagels ☐ Fresh Fruit
☐ Pancakes ☐ Danish/Muffins ☐ Hash Browns
☐ Other (specify) _____

Deli Sandwiches:
☐ BLT Sandwich
☐ Club Sandwich
☐ Ham & Cheese Sub
☐ Italian Sub
☐ Tuna Sub
☐ Turkey Sub
☐ Other (specify) _____

Salads:
☐ House Salad
☐ Chef Salad
☐ Caesar Salad
☐ Chicken Salad
☐ Grilled Chicken Breast Salad
☐ Tuna Salad
☐ Other (specify) _____

SAMPLE

CUSTOMER/PATRON SURVEY (cont.)

Grilled/Hot Sandwiches:

- ☐ BBQ Pork Sandwich
- ☐ BBQ Beef Sandwich
- ☐ Fish Sandwich
- ☐ Grilled Cheese
- ☐ Grilled Chicken
- ☐ Hamburgers (variety)
- ☐ Hot Dogs (variety)
- ☐ Meatball Sub
- ☐ Philly Cheese Steak
- ☐ Rueben Sandwich
- ☐ Steak Sandwich
- ☐ Other (specify) _____

Miscellaneous:

- ☐ Hot Wings
- ☐ Chicken Tenders
- ☐ Pizza
- ☐ Popcorn Shrimp
- ☐ Chili
- ☐ Nachos
- ☐ Soup
- ☐ Potato Skins
- ☐ Other (specify) _____

SAMPLE

11. Check the TWO TOP food types you would like to see added to the menu:

- ☐ BBQ
- ☐ Fried Chicken
- ☐ Mexican
- ☐ Oriental
- ☐ Pizza
- ☐ Rotisserie Chicken
- ☐ Other (specify) _____

12. On the average, how much would you spend, per visit, to eat at this facility?

- ☐ Less than $4.00
- ☐ $4.01 to $5.00
- ☐ $5.01 to $6.00
- ☐ $6.01 to $7.00
- ☐ $7.01 to $8.00
- ☐ More than $8.00

NOTE: You will need to edit this survey or develop one of your own based on the nature of your business, your location, focus, mission, etc.

Many business decisions are based on just knowing your customers/patrons, your base, and your industry.

Surveying to justify every little change is not necessary!

Step 2 Gather all data from recently completed surveys, questionnaires, focus group results, etc.

NOTE:	The customer/patron survey that we use in this task was designed for any Quick Service Food Operation. The steps in this Task are based on the sample data collected from this survey. If you have a completed survey for your operation the steps should be the same.

Step 3 Review the data collection instruments and discard any that you consider invalid.

Reasons include:

- Incomplete answers on surveys, questionnaires, etc.
- Illegible answers on surveys, questionnaires, etc.
- Questions answered in obvious jest or other useless ways.
- Survey instructions were misunderstood/ignored.
- Collection boxes stuffed.
- Data manipulated.

Step 4 Decide if you need to conduct additional surveys or get more returns.

IF THE NUMBER OF RETURNED USEABLE SURVEYS IS:	THEN
Sufficient.	Continue with Steps 6.
NOT sufficient.	Go to Step 5 and collect additional data.

NOTE:	To be confident in the data you need to collect the number of usable and reliable questionnaires/surveys you identified in Step 1. "Usable and reliable" refers to questionnaires/surveys or other data collected that is complete, legible, and free of obvious invalid entries. Continue distributing and collecting data by mail, person-to-person, survey software, etc. as needed.

Step 5 Continue distributing and collecting questionnaires/surveys until you have the appropriate number of ***usable and reliable*** surveys.

Step 6 Use a blank questionnaire/survey as a master sheet to tally the responses from all returned surveys. (See example on next page.)

- ☐ Review each returned questionnaire/survey and use only those that are complete, legible and free of obvious invalid entries.
- ☐ Record and total number of responses for each item.
- ☐ Consolidate written responses on the master sheet, adding additional sheets if necessary.

Step 7 Tally the needs/preference responses and calculate response percentages.

- ☐ By sorts/selected groupings.
- ☐ Record on tally cards as shown in the example below, on a computer, or on a blank copy of the survey instrument itself. (See example on next page.)
- ☐ Review and tally, one manageable pile/grouping at a time.
  - Although this process is tedious, it is paramount to the completion of this task.
  - If you have access to analysis software, your ability to tabulate and cross-tabulate is significantly enhanced and the time consuming manual chores are comparatively reduced. Follow the data entry and processing instructions appropriate to the software application being used.

Number of group-related responses:	_____ (A)
Divided by total group-related respondents:	_____ (B)
Multiplied by 100 equals response percentage:	_____ (C)

$$\frac{A}{B} \times 100 = C$$

EXAMPLE

The following example demonstrates how 54 customer/patron surveys were used to select items in the category, *"Grilled/Hot Sandwich"* items.

Number of responses to the category/group = 104.

- First, we tallied the responses for each grilled/hot sandwich food item listed and also those written in Step 6 onto a Master Sheet.

  (Customers selected two items in this category so there will be 108 tallied responses with a response percentage of approximately 200% due to rounding.)

Grilled/Hot Sandwich: (Check 2)

☐ BBQ Pork Sandwich	5	9%	☐ Hot Dog (Variety)	7	13%
☐ BBQ Beef Sandwich	4	7%	☐ Meatball Sub	10	19%
☐ Fish Sandwich	6	11%	☐ Philly Cheese Steak	20	37%
☐ Grilled Cheese	5	9%	☐ Rueben Sandwich	2	4%
☐ Grilled Chicken	14	26%	☐ Steak Sandwich	8	15%
☐ Hamburgers (Variety)	25	46%	☐ Other (Specify)		
			Patty Melt	1	2%
			Hot Pastrami on Rye	1	2%

- Next we calculated the response percentage for each item on the survey (Step 7).

  For example:

  BBQ Beef $\frac{4}{54} \times 100 = 7\%$

  Fish Sandwich $\frac{6}{54} \times 100 = 11\%$

  Grilled Cheese $\frac{5}{54} \times 100 = 9\%$

Step 8 Rank/prioritize response percentages from high to low. (List these on a piece of paper or with your word processing or spreadsheet software.)

EXAMPLE (cont.)

- Then we ranked/prioritized response percentages from high to low.

Burgers (variety)	46%	Y
Philly Cheese Steak	37%	Y
Grilled Chicken	26%	Y
Meatball Sub	19%	Y
Steak Sandwich	15%	Y
Hot Dogs (variety)	13%	?
Fish Sandwich	11%	?
Grilled Cheese	9%	?
BBQ Pork Sandwich	9%	?
BBQ Beef Sandwich	7%	N
Rueben Sandwich	4%	N
Hot Pastrami on Rye	2%	N
Patty Melt	2%	N

NOTE: This process may seem tedious, but it is essential to visualize your customer's/patron's preferences.

Step 9 Use the ranked/prioritized responses in Step 8 to develop a draft menu list.

☐ Include all items that have a response percentage of 15% or more.

EXAMPLE: We selected items (from Step 8) with responses equal to or greater than above 15%.

Burgers (variety)	50%
Philly Cheese Steak	45%
Grilles Chicken	30%
Meatball Sub	20%
Steak Sandwich	18%

NOTE: Depending on the distribution, you may need to accept percentages below 15%. In the example in the previous Step, hot dogs, the fish sandwich, grilled cheese, and the BBQ pork sandwich may need to be included in the initial/draft menu list.

Step 10 Include on the draft menu list all ***current*** menu items that account for 5% or more of sales.

☐ Refer to your Point of Sale/register tapes, scatter sheets, and similar records.

Step 11 Identify local preference items to add to the draft menu list.

- Local or regional favorites might include:

  - Burritos
  - Fish Tacos
  - Wraps
  - Steak Tacos

NOTE: Your final menu mix should include no less than 80% of the items on the list of menu items determined in Step 9 of this Task. The other 20% may be local, regional, or current trend items.

Step 12 Edit your draft menu list to match the purpose, design, and or theme of your food operation.

Step 13 Finalize your draft menu list based on the following considerations.

Each selected menu item:

- ☐ Scores high as a customer/patron preference.
- ☐ Is an industry/market trend item or staple?
- ☐ Is supported by the command and other stakeholders.
- ☐ Is not provided competitively by the local, off-base competition.
- ☐ Will not adversely affect other on-base MCCS food operations.
- ☐ Is available in the local supply of food products.
- ☐ Can be produced at a reasonable production cost.
- ☐ Can be offered at an acceptable price.
- ☐ Can be prepared and served in a reasonable amount of time relative to the purpose of the food operation.
- ☐ Does not require new or additional storage/holding space.
- ☐ Requires little or no new preparation and serving equipment, tools, utensils, serving settings, etc.
- ☐ Requires minimal or no change to the facility or major equipment items.
- ☐ Requires minimal staff training requirements.

Step 14 Cost and price each proposed menu item on your draft menu list.
(See Task 5.5, Evaluate Current Fees, Prices and Charges.)

Step 15 Submit the draft menu list for review and approval.

- ☐ Include applicable justification for changing the existing menu.
- ☐ Route for approval per local policy.

Step 16 Finalize your new menu based on feedback from the review and approval process.

Step 17 Advertise the benefits and the details of the new menu. (See Duty 10.0, Promote Your MCCS Program.)

Step 18 Update your hard copy menus or menu boards and the cash registers or Point of Sale (POS) system(s).

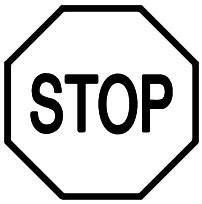
Step 19 Implement the new menu after ensuring the following.

- ☐ Taste tests have been completed.
- ☐ New products are in stock.
- ☐ Staff is trained on production and service.

Step 20 Monitor and evaluate the new menu. (See Duty 11.0, Evaluate Program/ Activities/Events.)

Step 21 Monitor your financials. (See Duty 5.0, Manage Budget and Funds.)

Step 22 Repeat the Steps in this Task based on customer/patron usage, staff input and/or financial results.



Congratulations! You've completed this task.

Continue on the next page for meeting customer/patron expectations.

MEETING CUSTOMER EXPECTATIONS; Steps 23 through 26

Step 23 Use the *Ensure Extraordinary Customer Service Survey* and the directions in Task 4.4, Ensure Extraordinary Customer Service to assess and improve all areas of your food operation.

Step 24 Use the data from your **Food Operation Customer/Patron Surveys** (page 12.1.9) and other customer/patron feedback to identify specific areas of customer/ patron service where you currently exceed, meet, or fall short of customer/ patron expectations.

Use customer/patron survey data about:

- ☐ How staff greet, recognize, and welcome customers/patrons.
- ☐ Staff skill/knowledge and confidence.
- ☐ How staff handle customer/patron concerns/problems.
- ☐ Food quality.
- ☐ Preparation and delivery consistency. (E.g., taste, temperature, appearance, presentation, portions, etc.)
- ☐ Comparison of delivery time expectations to actual delivery times.
- ☐ Operation's appearance and cleanliness.

Step 25 Take corrective action when customer/patron service expectations are not being met.

Use the table on the next page to help identify possible solutions/actions.

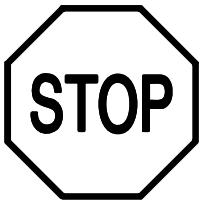
Step 25
(cont.)

IF:	THEN:
Customer/patron service times are too long and **NOT** meeting expectations.	1. Identify those items that can be pre-prepped to expedite service. 2. Evaluate production flow and reconfigure setup for efficiency (if possible). 3. Ensure staff members use correct prep/production methods. 4. Adjust the number of staff members scheduled. 5. Help staff members as needed during peak times.
Staff member greeting does **NOT** make the customer/ patron feel recognized and important.	1. Review your customer/patron service philosophy. 2. Identify cause for staff-to-customer/patron failures. (E.g., is the staff over-scheduled?)
Customer/patron problems are **NOT** being handled in a courteous manner.	1. Empower the staff members to respond to customer/patron complaints by: • Acknowledging there is a problem. • Asking the customer/patron what he/she wants. • Replacing product with same or different item. • Seeking the manager to assist with the problem when they can not satisfy customer/patron.
The customer/patron is **NOT** receiving a consistently prepared product. • Orders are incorrect. • Incorrect ingredients used in preparation. • Quality is poor or inconsistent.	1. Ensure order taker repeats each order back to the customer/ patron to ensure accuracy. 2. Ensure staff members use correct portion/prep/ production methods. 3. Ensure correct products are being purchased per specifications. 4. Ensure equipment is functioning properly. 5. Ensure orders are moving from production and/or service area to customer/patron efficiently. 6. Ensure Point-of-Sale System is correctly programmed.
The customer/patron does **NOT** rate the facility as clean or attractive. • Service area is dirty and/or lacks supplies. • Seating area has dirty tables, chairs, floors, etc. • Restrooms are dirty and/or lack supplies.	1. Assign a staff member to check each area using the appropriate management checklist hourly or as needed. (See Tasks 8.2 and 8.3.) 2. Ensure a pre-opening walk through every morning to assess maintenance and cleanliness. 3. Provide proper tools and equipment. 4. Schedule cleaning and maintenance.
The customer/patron indicates a possible problem in skill, knowledge or confidence of staff member.	1. Ensure training program is in place and attended by all staff members. 2. Ensure effectiveness of training.

Step 26 Monitor your operation to ensure customer/patron expectations are met.

Use the following:

- ☐ Surveys.
- ☐ Comment cards.
- ☐ Direct feedback from the customer/patron.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD and BEVERAGE OPERATIONS

TASK 12.2

Ensure Safe Food Handling and Storage

DO THIS TASK WHEN

- Accomplishing the daily responsibilities of a manager/ supervisor.
- There is evidence or reports of pests and/or rodents in or around the facility.
- Your local health inspector reports items that are not being stored or handled in a sanitary way.
- Current procedures do not sufficiently protect customers/ patrons and/or staff members from food-borne illnesses.
- Meeting industry standards in food safety.

REFERENCES

- NAVMED P-5010 (series), Manual of Naval Preventive Medicine.
- ServSafe Essentials, National Restaurant Association, Educational Foundation.
- Hazard Analysis Critical Control Point (HACCP) Reference Book, The Education Foundation of the National Restaurant Association, Chicago, IL, 1993.
- OPNAVINST 5100.23 (series), Navy Occupational and Health (NAVOSH) Program Manual.

SUPPLIES/ RESOURCES

- Safe food handling/storage checklists.
- Information about safe thawing and preparation procedures.

SUPPLIES/ RESOURCES (cont.)

- Temperature log(s) with required holding/storage temperatures.
- Calibrated thermometers (storage/probe).
- Typical office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Procedures are in place to minimize the potential for food-borne illness from incorrect handling, preparation and storage.
- Refrigerated storage units (freezers and coolers) are monitored each day to ensure products are stored at temperatures that ensure safety and maintain product quality.
- Food and beverage activities comply with all local and higher level directives and standards regarding safe and sanitary food operations.

NOTES

Managers involved with the purchasing, preparation, and sales of consumable products are responsible for protecting customers/patrons and staff members from food-borne illness.

Correct holding/handling, and preparation procedures begin the moment products are delivered by a vendor and continue until the food is consumed or properly disposed.

Correct receiving practices ensure products are kept at safe temperatures and in protective packaging. Manufacturers go to great lengths to ensure their products are stored, delivered, prepared, and served safely and in the best possible condition.

Read all manufacturers' instructions carefully--you will not go wrong. If in doubt, ask your vendors for information. Many will even assist in training your staff in safe preparation and handling of their products.

NOTES (cont.)

AUTHORITY: Your local Preventive Medicine Authority (PMA) is responsible for the following:

- Sanitation and routine inspections of all food establishments.
- Medical screening of food service personnel.
- Providing food service safety/sanitation training programs.
- Review of plans and specifications relating to construction or renovation of food establishments.
- Epidemiological investigations in the event of food-borne illness outbreaks.

Contact your local PMA to ensure compliance with local clearance and training requirements.

- Food safety and sanitation training may be obtained from civilian sources if approved by the PMA.
- Approved training sources may include:
  - The National Restaurant Association's Educational Foundation ServSafe® Courses.
  - The American Hotel & Lodging Association's Educational Institute.
  - Food vendors who provide approved training.

MEDICAL: All Food Service Employees shall be medically screened for evidence of communicable disease prior to assignment in food service.

Employees may be screened at a local military facility or present documentation, acceptable to the PMA, that a complete and thorough health screening has been accomplished at a non-military facility.

NOTES (cont.)

Documentation of medical screening must be kept on file at the food and beverage facility. Contact your local PMA or the Environmental Health Officer for procedural guidance.

TRAINING: There are three parts to the required safety and sanitation training.

1. **Person in Charge:** Attendance at the Supervisor/Manager Food Service Safety and Sanitation Training Course is required for all personnel designated as "person in charge". This 18-hour course is provided by the PMA and is required for personnel prior to assuming supervisory or management duties. The course is required every 3 years. The course also certifies supervisors/managers to teach the Food Safety course (minimum of 4 hours annually) to their staff.

2. **Food Safety Training:** All food service staff must receive a minimum of 4 hours of food safety training. This training is required within the first 30 days of beginning employment.

3. **Food Sanitation Training:** All food service staff must receive a minimum of 4 hours food sanitation training within the first 12 months of beginning employment and annually after that.

   Exceptions to this are:

   - Employees assigned employment for 30 days or less must receive 2 (two) hours of food safety and sanitation training upon assignment.

   - Bartenders who do not work with food must receive 1 (one) hour of food sanitation training upon assignment.

NOTES (cont.)

Ensure a record of medical clearance and training for all staff members are kept on file at the food service facility.

We recommend you develop a safe food-handling plan using the HACCP Reference as a guide. (See References listed at the beginning of this Task.) You will be able to develop a plan that reduces risk at every step of the food production process from receipt of goods to delivery of product including applicable cleanup and maintenance procedures.

We recommended you involve your local PMA and other health inspectors when developing a plan of action to complete this task. They can provide information that will help you with your plan and you will discover their "hot issues".

This Task is divided into two parts:

(1) Ensure Personal Hygiene.

(2) Ensure Safe Food Handling and Storage.

PROCEDURE

Step 1 Determine the procedure you need to complete:

IF YOU NEED TO:	THEN COMPLETE STEPS:
Ensure staff follows appropriate personal hygiene requirements.	2 through 5.
Ensure staff uses safe food holding/handling methods.	6 through 14.

PERSONAL HYGIENE, Steps 2 through 5

Step 2 Ensure each staff member who handles food/beverage has the required medical clearance. (See general notes at the beginning of this Task.)

☐ Maintain a copy/record of all medical clearances for all food/beverage service workers.

☐ Validate each clearance document by ensuring the following:

- ☐ Name is accurate.
- ☐ Dates are current.
- ☐ Valid for your base/state.

IF STAFF MEMBER:	THEN:
Has a valid medical clearance.	Continue with Step 3.
Does **NOT** have a valid medical clearance.	1. Arrange for the staff member to get a medical exam and clearance *before* beginning work. **NOTE:** Food handlers cannot work before a medical clearance is obtained. 2. Once the staff member has his/her clearance, continue with Step 3.

Step 3 Develop a checklist of personal hygiene requirements for all staff members. (See Task 8.3, Inspect Facility/FF&E for examples of various style checklists.)

Your checklist should include:

- ☐ Procedures to notify a supervisor and to obtain a medical clearance, when known to have had a communicable illness, or an infection.
- ☐ Bathe/shower daily.
- ☐ Wear clean clothing daily.
- ☐ Keep hair neat, clean, and restrained.
- ☐ Keep beards/mustaches trimmed, clean, and restrained.
- ☐ Wash hands and exposed parts of arms regularly--**especially after:**
  - Handling meat, fish, or poultry and **always** when moving from one product to another.
  - Touching anything that may be contaminated with bacteria.
  - Eating, drinking, or smoking.
  - Using the toilet.
  - Handling/removing trash and/or garbage.
  - Handling anything other than the immediate food product. (E.g., money, furniture, equipment, cleaning gear, cleaning materials, etc.)
- ☐ Cover coughs and sneezes, then always wash hands.
- ☐ Keep hands away from face and hair.
- ☐ Keep fingernails short, clean.
- ☐ Do not smoke or chew gum while on duty.
- ☐ Cover cuts or sores with clean, sanitary bandages.
- ☐ Use clean gloves when preparing menu items. (Change gloves between products.)
- ☐ Use appropriate utensils and tools for mixing, measuring or serving.
- ☐ Others in accordance with regulation and local policy.

Step 4 Ensure staff members follow the checklist you prepared in Step 3.

Do the following:

- ☐ Include the checklist during orientation.
- ☐ Give each staff member a copy.
- ☐ Post the checklist in various locations throughout the establishment.

Step 5 Follow up to ensure that staff members are in compliance with medical clearance and personal hygiene requirements. (Do this as part of your daily *walking about*.)

Accomplish the following:

- ☐ Ensure medical clearances remain current.
- ☐ Ensure staff follows personal hygiene requirements.
- ☐ Provide positive feedback when personal hygiene requirements are followed.

NOTE:	**DON'T** embarrass staff members in front of others. If you need to talk to any staff member about their personal hygiene, do so privately. Besides posting signs in bathrooms and other places, have a full length mirror available so that staff can do a self inspection. Whenever possible, provide uniforms, hair restraints, protective clothing, safety equipment, etc. Provide everything that your staff needs to meet the hygiene standards. Some situations may require the staff wear their own clothes. If this is the situation, ensure your staff adheres to established standards for cleanliness and appearance.

SAFE FOOD HANDLING/HOLDING, Steps 6 through 14

Step 6 Use correct methods for heating and holding leftovers and pre-prepared food items.

IF ITEMS ARE:	AND:	THEN:
Delivered/purchased in a precooked state.	They are accompanied with manufacturer's instructions.	Follow the instructions to the letter and hold at 140°F.
	They are **NOT** accompanied with manufacturer's instructions.	1. Get instructions from the vendor. 2. Follow the instructions to the letter and hold at 140°F.
Leftovers. (Used **ONLY** once previously.)	Quality is acceptable.	Reheat (using microwave, stove-top, or oven) as quickly as possible to a high temperature (165°F) and hold at 140°F.
	Quality is **NOT** acceptable.	**Do not use. Discard!**

NOTE: **NEVER** re-freeze products that were received frozen and have been allowed to thaw.

The rule of thumb should be, "If in doubt--throw it out".

Step 7 Keep hot foods hot and cold foods cold on the service lines and in display areas. (Keep all foods in a protected and safe condition at all times.)

IF PRODUCT IS SERVED:	THEN ENSURE PRODUCT:
Hot.	• Temperature stays at or above 140°F. • Is stacked below the rim of holding container. • Is stirred/turned frequently. • Is protected by lids and/or sneeze guards.
Cold.	• Temperature stays at or below 41°F. • Is stacked below the rim of its holding container. • Is turned/stirred frequently. • Is protected by lids and sneeze guards.

NOTE: Ensure the final steps of preparing (mixing together) combination salads like coleslaw, potato salad, etc., containing mayonnaise, eggs, or other dairy products occur as close to the service time as possible. Prepare these items in small batches to avoid long holding periods. (Never hold for more than 3 hours.)

Discard all combination salads like coleslaw, potato salad, etc., containing mayonnaise, eggs, or other dairy products that are left over on the service/prep line after a meal period.

Never store food items on the service lines or in display cases. All food items to be held between service times are to be stored in refrigerated storage units.

Step 8 Develop a locally prepared Safe Food Handling and Preparation checklist.

Include the following in your checklist:

- ☐ Wash hands after visiting restrooms or trash/garbage areas.
- ☐ Ensure all raw foods are fresh, in good condition, and have been vet inspected, if required.
- ☐ Handle food with tongs, spatulas, spoons, etc., whenever possible.
- ☐ Wear and change plastic gloves before handling a new/different food product.
- ☐ Sanitize utensils and surfaces after each use and before beginning work on a different product. This includes slicers, cutlery, cutting boards, mixers, etc. Wear and change plastic gloves between working with poultry, meat and other products like vegetables, fruit, etc. (Cooked and raw.)
- ☐ Make the "*clean as you go*" rule an everyday practice.
- ☐ Wash raw fruits and vegetables prior to preparation.
- ☐ Do not break out any more product from refrigeration than can be prepared within one hour.
- ☐ Keep all food items covered and properly stored when not in use.
- ☐ Do **NOT** mix leftovers with freshly prepared products.
- ☐ Keep all high protein products (poultry, meat, eggs, dairy and combinations like mayonnaise type salads) between 33°F and 41°F, but **don't** freeze.
- ☐ Install sneeze guards on all self-serve counters.
- ☐ Label all products returned to refrigerator with the date, time, and discard date.

Step 9 Develop a locally prepared Safe Thawing Procedure checklist.

Include the following in your checklist:

☐ Move products from the freezer to the refrigerator to thaw. (This requires planning and use of pull/prep sheets.)

☐ Place products on perforated sheet/container over trays or inserts, or on racks in containers large enough to prevent the product from sitting in water/blood drippings.

☐ Thaw meat by type in separate pans or containers to prevent cross contamination.

- Poultry.
- Pork.
- Beef.
- Seafood.

☐ Thaw and hold seafood and meats on the bottom shelves of the refrigerator to ensure that any liquids spilling from these thawing pans cannot contaminate other foods.

☐ Cover all thawing products with a lid or paper wrap.

☐ Allow 24-48 hours for complete thawing. The total time needed for complete/proper thawing will depend on the bulk of the food item and on the manufacturer's instructions/recommendations.

Step 10 Follow up to ensure that staff are preparing food in accordance with established procedures and are using a locally prepared Safe-Thawing Checklist. (Do this as part of your daily *walking about*.)

Step 11 Dispose of all leftovers, waste, and spoilage in accordance with local policy and higher authority directives.

NOTE:	Record all food losses in accordance with local policy and higher authority directives. (See Duty 7.0, Manage Supplies and Equipment.)

Step 12 Store food and beverages in accordance with manufactures' instructions and all local and higher authority requirements.

In the absence of any guidance, use the following table as a guide:

REFRIGERATOR STORAGE TEMPERATURE GUIDE		
ITEM	**TEMP**	**NOTE**
Raw Meat.	34-38°F (1-4°C)	Never allow different types to touch. (E.g., beef, pork, etc.)
Cooked Meat.	34-40°F (1-5°C)	
Poultry.	34-38°F (1-4°C)	Ice packed and on bottom shelf.
Seafood.	34-38°F (1-4°C)	
Produce.	36-40°F (2-5°C)	Best stored in plastic containers after removing from delivery containers.
Dairy/Eggs.	34-38°F (1-4°C)	Store in original container.

NOTE: In the absence of sufficient refrigeration units that would permit setting various holding temperatures, store all non-frozen items between 34°F and 38°F (1-4°C).

Step 13 Use Temperature Logs and scheduled monitoring of each refrigeration unit to ensure appropriate actions are taken to maintain correct temperatures and prevent food losses.

- ☐ Read and record temperature of each refrigeration unit at least twice daily.
- ☐ Take appropriate action to fix unacceptable temperature conditions.
- ☐ Keep the Logs close to the refrigeration units or with opening and closing checklists. (See example log on page 12.2.17.)

NOTE: Refrigeration units' s will vary in temperature depending on:

- How many times each unit's doors are opened.
- How recently each unit was restocked.
- Amount of product stored in the unit.
- Age/condition of unit.

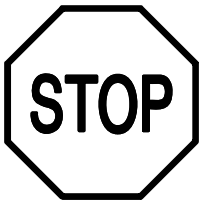
Allow sufficient time between readings to account for any of the above.

IF:	THEN:
Temperature is within recommended range. (See Step 12.)	1. Record temperature, date, and time of reading on unit's Temperature Log. 2. Initial Temperature Log. 3. Go to Step 14.
Temperature is **NOT** within recommended range.	1. Record temperature, date, and time of reading on unit's Temperature Log. 2. Investigate possible problem. 3. Take action as suggested on the back of the example temperature log. 4. When problem/cause is corrected go to Step 14.

NOTE: Well-maintained storage units are critical to this Step.

Ensure you have a maintenance program in place that keeps all the refrigerated units operating efficiently. (See Duty 8.0, Manage The Physical Plant.)

Step 14 File all temperature logs as part of your HACCP documentation and retain the logs a minimum of 1-year.



Congratulations! You've completed this task.

TEMPERATURE LOG (Front)							
Date	Ref/Box	Temp - °F	AM	Initials/ Notes	Temp - °F	PM	Initials/ Notes
9/5/YR	Reefer #1	38	0900	MP	38	2330	BV
	Reefer #2	36	0900	MP	36	2330	BV
	Beer Box #1	39	0900	MP	40	2330	BV
	Freezer	28	0900	MP	25	2330	BV
9/6/YR	Reefer #1	38	0930	MP	38	2300	BV
	Reefer #2	36	0930	MP	37	2300	BV
	Beer Box #1	40	0930	MP	39	2300	BV
	Freezer	25	0930	MP	29	2300	BV
9/7/YR	Reefer #1	38	0915	MP	37	2300	BV
	Reefer #2	37	0915	MP	36	2300	BV
	Beer Box #1	39	0915	MP	40	2300	BV
	Freezer	22	0915	MP	25	2230	BV
9/8/YR	Reefer #1	45	0900	Door left open MP	39	1700 and 1730	OK now BV
	Reefer #2	36	0900	MP	37	2230	BV
	Beer Box #1	38	0900	MP	40	2230	BV
	Freezer	24	0900	MP	26	2230	BV

SAMPLE

TEMPERATURE LOG (back)		
IF:	**AND:**	**THEN:**
Temperature is above maximum range by 10°F or more.	→	1. Confirm unit is plugged in. 2. Confirm unit's thermometer is working.
	Door open.	Close door.
	Thermostat set incorrectly.	Reset thermostat.
	Fuse blown.	Replace fuse.
	Circuit breaker tripped.	Reset circuit breaker.
	• Electrical outage. • Equipment breakdown.	1. Move items to another storage area. 2. Follow local policy to report problem.
Temperature is below minimum range by 10°F or more.	→	1. Confirm unit's thermometer is working. 2. Replace as required.
	Thermostat set incorrectly.	Reset thermostat.
	Thermostat failed.	1. Move items to another unit. 2. Follow local policy to report problem.
	Equipment breakdown.	

SAMPLE

NOTE: Following any corrective action, monitor the unit's temperature every half-hour for one to two hours to ensure the condition is corrected.

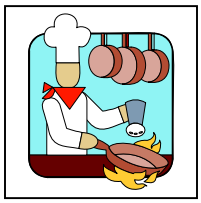
Make an entry on your daily log on what you have found and the action that you took.

Refrigeration should never cool to below 33°F.

Freezers should never be above 30°F.

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD and BEVERAGE OPERATIONS

TASK 12.3



Ensure Efficient Food Production/Service

DO THIS TASK WHEN

- Accomplishing the daily responsibilities of a manager/ supervisor.
- Establishing a new food operation within your Program.
- Menus are changed.
- Customers/patrons are NOT receiving their food orders within an acceptable length of time due to inefficient set up, production methods, and/or equipment layout.
- Adding new equipment and/or remodeling the food service area.
- Menu items are *unavailable* to customers/patrons due to insufficient product being prepared or pulled.
- There are significant amounts of food leftovers on the service line at the end of meal periods.

REFERENCES

- MCO P1700.27A (series), MCCS Policy Manual.
- NAVMC 2913 (series), Food and Hospitality Operations Manual.

SUPPLIES/ RESOURCES

- Daily Pull Sheets.
- Daily Food Prep Sheets.
- Daily usage reports from Point of Sale system.
- Previous day's Daily Food Prep Sheets.
- Standardized/local recipes.
- Information about the special needs/requirements of upcoming events at your facility or the base.
- Information about troop/unit movements.
- Layout plan of current production and service areas.
- General office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Customers/patrons receive their food order in the minimum possible time.
- Food service area efficiency is optimal.
- All applicable food items needed to complete customer orders are on hand, pulled (broken out) in the appropriate quantities and at the appropriate time, and properly prepared for each meal.
- Amount of food left on the service line at the end of each meal period is minimal.
- Food production waste is minimized/eliminated.
- The layout and organization of the food operation allows staff to take the fewest possible steps and make the fewest motions possible to prepare menu items, serve customers, etc. (Do their various jobs.)

NOTES

Few things are more frustrating to a food service worker than having to run all over the kitchen to fill a simple order.

Food service managers have the responsibility to ensure their operation's facility, policies, procedures, practices, menu items, equipment, tools, utensils, etc., are designed, arranged, and organized to accomplish "quick" (efficient) preparation and service.

An efficient system of preparation, set-up and service are essential to a smooth running line and food operation. Managers must ensure an efficient production flow from the time a menu item is ordered until it is prepared and delivered to the customer/patron. (The term "production flow" refers to how a menu order is prepared and assembled from order to service.)

Efficient food service operations incorporate the following:

- First, products are "pulled" from storage either in a frozen, packaged, or unfinished state. (A daily pull sheet ensures sufficient products are available for preparation.)

- Then the products must be "prepped" for service. (The daily food prep sheet shows what and how much to prep and when to have it ready.) Eliminating guesswork during setup and production is a must.

Most quick service menu items do not require any special equipment. This task assumes the availability of the most basic equipment (e.g., pizza press, pizza oven, grill/broiler, griddle, utensils/small-wares, and ingredients).

NOTES (cont.)

This Task provides assistance with the following three procedures:

- Prepare Daily Pull Sheet.
- Prepare Daily Food Prep Sheet.
- Ensure Efficient Production Flow.

This Task provides guidance to ensure efficient food production and service.

Task 4.4, Manage Your Time and Things-To-Do will help improve your individual efficiencies and effectiveness.

PROCEDURE

Step 1 Determine which Steps you need to complete.

IF YOU NEED TO:	THEN COMPLETE:
Prepare Daily Pull Sheet.	Steps 2 through 6.
Prepare Daily Food Prep Sheet.	Steps 7 through 10.
Ensure Efficient Production Flow.	Steps 11 through 14.

PREPARE DAILY PULL SHEET, Steps 2 through 6

Step 2 Gather all available materials and information to determine what, and how much, product you will need on hand.

Available documents may include:

- Daily Pull Sheet. (Blank form.)
- Recipe cards for menu items from approved and tested sources NAVMC 2913 and current F&H regulations, recipe books, etc.
- Daily usage report. (From point of sale system tape.)
- Variance reports. (Refer to Task 12.4, Control Food Costs.)
- Previous day's/shift daily food pull and daily food prep sheets.
- List of items left from previous shift or day.
- Information on base special events/activities, troop/unit movements, etc. (Anything that affects the "average" customer count.)

Step 3 Prepare a Daily Pull Sheet using the information you have collected and the sample below. (A blank copy is provided at the end of this Task).

Include the following:

- ☐ Operation. (Name of the food operation.)
- ☐ Day and Shift. (The current business day and/or work shift.)
- ☐ Date. (Current business month/day/year.)
- ☐ Item. (Food item/product to be pulled.)
- ☐ Item Unit. (How the food item is packaged/sized.)
- ☐ Item Par. (Average usage for the shift.)
- ☐ On Hand. (Balance of food items available in prep/service area from previous shift.)
- ☐ Pull Amount. (Amount/number to pull. Item Par - On Hand = Pull Amount.)
- ☐ Pull To. (Where food item will be held, assembled or served from.)
- ☐ Assigned To. (The staff member responsible to pull the item[s].)

DAILY PULL SHEET

Operation: 10 Pin Snack Bar **Day and Shift:** Monday (AM) **Date:** 7/7/XX

ITEM	ITEM UNIT	ITEM PAR	ON HAND	PULL AMOUNT	PULL TO	ASSIGNED TO
Chicken Breast 5 oz	Each	24	0	24	Grill line	Bill
Chili	5 lb bag	2	1	1	Prep box	Anne
Onion Rings	Box	4	1	3	Line freezer	Anne
Burgers	Each	75	35	40	Grill line	Bill
Hamburger Buns	Dozen	4	2	2	Grill line	Bill
Hoagie Rolls	Dozen	5	1	4	Grill line	Bill
Pickles, Dill	Gal	2	1	1	Grill line	Bill

SAMPLE

NOTE: Particularly large operations may choose to add a column labeled **Pull From** indicating where the various food items are stored.

Step 4 Distribute and post the Daily Pull Sheet.

- ☐ Ensure daily/shift and "pull" assignments are clearly communicated and understood by all staff members.
- ☐ File the Daily Pull Sheet for future use.

NOTE:	Filing copies of the Daily Pull Sheets provides a paper trail of who pulled what and when, which is useful for tracking and audit purposes. Retain these for a minimum of 30 days.

Step 5 Ensure assigned staff members use the Daily Pull Sheet to:

- ☐ Pull required products from freezer to thaw for use on the service line**.**
- ☐ Pull prepared products for sandwich unit/steam table setup**.**

Step 6 Confirm amounts pulled and on-hand. Make adjustments throughout the shift as needed.

PREPARE DAILY FOOD PREP SHEET, Steps 7 through 10

Step 7 Prepare a Daily Food Prep Sheet with the following information. See sample on page 12.3.11. (A blank copy is provided at the end of this Task).

Daily Food Prep Sheet should include:

- ☐ Operation. (Name of the food operation.)
- ☐ Day and Shift. (The current business day and/or work shift.)
- ☐ Date. (The current business month/day/year.)
- ☐ Item. (Food item/product to be prepared.)
- ☐ Assigned To. (Staff member responsible for doing preps.)
- ☐ Item Par. (Average amount needed for the shift/meal period.)
- ☐ On Hand. (Inventory balance of food items left from previous pulls.)
- ☐ Unit Size. (How the food item is portioned. (E.g., oz., slice, ea., etc.)
- ☐ To Prep. (Number/amount of portions to prep. Item Par - On Hand = to Prep Amount.)
- ☐ Time needed. (The time the food item should be ready to serve.)
- ☐ Prep Instructions. (Use as needed.)
- ☐ Special Instructions. (Use as needed.)

NOTE: Daily preparation amounts may need adjustment for:

- Holidays.
- Weather.
- Troop/unit movements/deployments.
- MCCS special events.
- Payday.

DAILY FOOD PREP SHEET

OPERATION: 10 Pin Snack Bar **DAY and SHIFT:** Tuesday AM **DATE:** 7/4/XX

ITEM	ASSIGNED TO	PORTIONS				TIME NEEDED	PREP INSTRUCTIONS
		Item Par	On Hand	Unit Size	To Prep		
Turkey Breast	Chuck	10	2	2 oz.	8	10:30	Slice on #8
Honey Ham	Chuck	20	10	2 oz.	10	10:30	Slice on #8
Chili	Chuck	20	10	8 oz.	10	11:00	Heat to 180°F.
Cole Slaw	Amy	2 gal	0	Gal	2	11:00	Use Oldest Cabbage.

SPECIAL INSTRUCTIONS: Make sure meat portions are separated with pattie paper.

Step 8 Distribute and post the Daily Food Prep Sheet.

- ☐ Ensure daily/shift "prep" assignments are clearly communicated and understood by all staff members.
- ☐ File Daily Food Prep Sheet for future use.

NOTE:	Filing copies of the Daily Food Prep Sheets provides a paper trail of who prepared what and when useful for tracking and audit purposes. Retain these for a minimum of 30-days.

Step 9 Ensure assigned staff members use the Daily Food Prep Sheet to prepare products for use in the amounts needed.

Step 10 Check daily for inadequate or excessive food preparation and make adjustments as needed to meet daily needs.

IF:	THEN:
Products used to produce menu items are running out.	Adjust Par and increase the amount of product being prepared.
Products are thrown out from sitting too long.	Adjust Par and decrease the amount of product produced.

ENSURE EFFICIENT PRODUCTION FLOW, Steps 11 through 14

STEP 11 Evaluate your operation's current production flow and equipment layout to determine if it meets the following criteria. (A sample layout is provided at the end of this Task).

ENSURE THE FOLLOWING:

- ☐ Equipment placement allows one person to work two stations.
- ☐ Everything needed to assemble any menu item is within easy access (two steps).
- ☐ Adequate storage (frozen and chilled) is provided on the service line.
- ☐ Salad preparation area is away from the grill area. (Some salads can be pre-prepared.)
- ☐ Items in the sandwich/steam table units are placed efficiently. (E.g., order of use/assembly, ease of access, minimizes dripping/ contamination, etc.)
- ☐ Products that drip are placed nearest work assembly area. (Front.)
- ☐ Wiring from toasters and other electrical appliances are not near, or in the way of, work surfaces.
- ☐ Hot items are kept separate from cold items.
- ☐ Menu orders are assembled and delivered (where possible) in a straight line. (I.e., without going backwards and forwards to complete.)
- ☐ Self-serve items are typically located ***before*** the cash registers.
- ☐ Beverage service is at the end of the service line. (Cups held at register).
- ☐ Customer/patron order pickup area is separated from the preparation area and close to the cash register.
- ☐ Menu board is visible from all cash register and ordering areas.

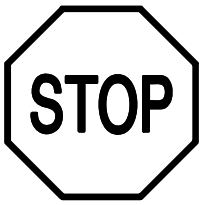
Step 12 Determine what action to take, if any, to ensure an efficient production level for proposed menu items.

IF PRODUCTION FLOW/EQUIPMENT LAYOUT	AND PROJECTED SALES OF THE SELECTED MENU ITEMS (BASED ON CUSTOMER/PATRON SURVEY RESULTS) WILL:	AND LOCAL COMMAND IS:	THEN:
Meets the efficient production flow/ equipment layout criteria.	→	→	1. Include the selected items on your menu. 2. Continue with Step 13.
Does **NOT** meet the efficient production flow/equipment layout criteria.	Offset the cost to change the production flow/ equipment layout.	Willing to invest money to change the production flow/equipment layout to produce items more efficiently.	1. Include the selected items on your menu. 2. Contact MCCS for assistance with equipment layout and line/service area setup. 3. Continue with Step 13.
		NOT willing to invest money to change the production flow/equipment layout to produce selected menu items more efficiently.	1. Simplify one or more production steps (e.g., use pre-prepared products and/or pre-portioned side items for the menu. 2. Continue with Step 13.
	NOT offset the cost to change the production flow/equipment layout.	→	1. Drop selected/ proposed items from the menu. 2. Continue with Step 13.

Step 13 Monitor production flow and setup daily to identify adjustment opportunities.

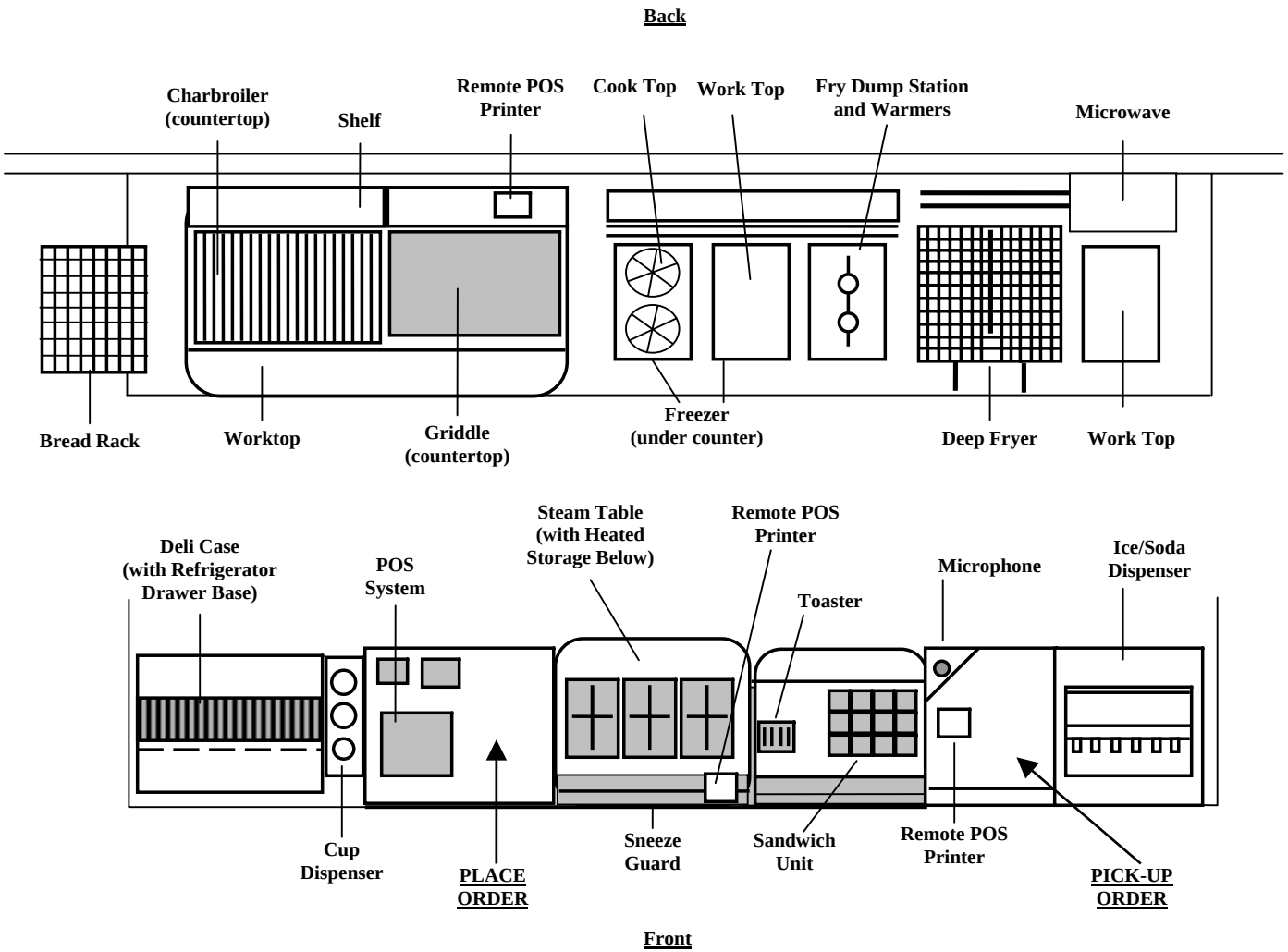
Step 14 Make adjustments as needed for efficiency and to ensure customers/patrons receive products in the shortest amount of time, with the least amount of handling.

IF:	THEN:
A customer/patron waits more than an acceptable amount of time for a menu item.	1. Simplify one or more production steps. 2. Return to Step 11.
Employee movements impede production.	1. Return to Step 11. **- OR -** 2. Train/decrease staff. **- OR -** 3. Add more stations.



Congratulations! You've completed this task.

Example: Quick Service Operation Equipment Layout



DAILY PULL SHEET

Operation: **Day and Shift:** **Date:**

ITEM	ITEM UNIT	ITEM PAR	ON HAND	PULL AMOUNT	PULL TO	ASSIGNED TO

DAILY FOOD PREP SHEET

OPERATION: _____ **DAY and SHIFT:** _____ **DATE:** _____

ITEM	ASSIGNED TO	PORTIONS				TIME NEEDED	PREP INSTRUCTIONS
		Item Par	On Hand	Unit Size	To Prep		

SPECIAL INSTRUCTIONS:

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD and BEVERAGE OPERATIONS

TASK 12.4

Control Food Costs

DO THIS TASK WHEN

- Accomplishing your daily responsibilities as a manager/ supervisor of a food operation/activity.
- You have responsibility for and/or control of sensitive, high value, and/or typically pilfered supplies/products.
- Examining or implementing controls to prevent or minimize loss of your supplies, resale products, equipment, cash, and near cash, etc.
- The Cost Of Goods Sold (COGS) is greater than the guidelines or goals for your operation.
- Complying with local or higher level instruction or policy.

REFERENCES

- MCO P1700.27A (series), MCCS Policy Manual.
- NAVMC 2913 (series), Food and Hospitality Operations Manual.
- DODI, 1015.10 (series), Programs for Military Morale, Welfare, and Recreation (MWR).
- Manager's Daily Planner, Business Operations Team Food Beverage & Entertainment, Personal and Family Readiness Division (MRK).

SUPPLIES/ RESOURCES

- Checklists used to manage your food operation.
- Food cost variance report.
- Current and prior month's financial statements.
- General office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- A system is in place to monitor COGS.
- COGS are within guidelines and goals.
- Profit margins are maximized.
- Control procedures minimize or prevent loss of supplies, resale products, equipment, cash, and near cash, etc.

NOTES

There are two main purposes for a retail sales business.

- The first purpose for a retail sales business is to generate income. Income received from the sale of products and services is called the "top line". Attention to all aspects of your business that contribute to sales is critical. You will find procedures throughout this desk reference to help maximize your top line figures.

- The second purpose for a retail sales business is to generate a profit. Profit is the income left after "expenses" have been deducted. This is generally referred to as the "bottom line". To achieve an acceptable and sometimes required bottom line, you must control expenses.

  This occurs by paying attention to and controlling your supplies, resale products, equipment, cash, and near cash, etc.

NOTES (cont.)

The focus of this Task is controlling costs. Specifically, *minimizing/eliminating* losses of supplies, resale products, equipment, cash, and near cash, etc.

An effective internal control system is a safeguard against fraud, waste, and abuse of government assets. Establishing control of any Program's assets is more than good business practice -- it is adhering to official policy.

The size of the operation, sales volume, and other business elements will determine the complexity of the procedures needed to control assets, inventory, sales, and costs.

This Task provides steps to help you control the COGS in your food operation. An additional and effective method of controlling your costs is *"management by walking around"*. Remember to inspect what you expect.

Review all of Duty 7.0, Manage Supplies and Equipment for in-depth guidance on inventory management, controlling shrinkage, and property/asset management.

Review Task 5.4, Analyze Financial Statements for guidance on controlling Cost Of Goods Sold (COGS).

Review Tasks 5.6 through 5.10 for guidance on cash handling, change fund and petty cash fund management, daily close out, and conducting surprise cash counts.

Review Task 8.5, Ensure Proper Disposal of NAF/APF Property, Equipment and Vehicles, and Task 8.6, Ensure Proper Disposal of Lost/Stolen Property, Equipment or Vehicles for guidance on NAF and APF lost/stolen/damaged property disposal and disposition.

Duty 6.0, Manage Staff provides guidance on important staff/personnel issues.

PROCEDURE

Step 1 Make a list of the areas in your food operation that require regular monitoring to prevent loss due to fraud, waste, abuse, or carelessness.

Typically, they are the following:

- Purchasing.
- Receiving.
- Storage.
- Security.
- Inventories/inventorying.
- Recipes.
- Menu pricing.
- Portion control.
- Waste/spoilage.
- Sales controls.

NOTE: Controlling food cost is an *every* day process. A manager/supervisor has to frequently walk through the operation to ensure the operating procedures, outlined in this desk reference, are being used.

Things to look for include:

- Employees following established procedures.
- Products meeting standards.
- Customer/patron needs and expectations are met/exceeded.

Step 2 Use/adapt the Food Cost Control Checklist on the following pages to check the areas most important/applicable to controlling costs in your operation.

NOTE: The following checklist is comprehensive, but not exhaustive. Every area listed needs some form of control. Most controls should be included in the staff's Position Descriptions (PDs) or assigned to applicable staff members. The manager's responsibility is to provide the best and most reasonable monitoring and controls systems and methods possible and to ensure each staff member accomplishes his/her control assignments.

FOOD COST CONTROL CHECKLIST

PURCHASING:

- ☐ Person doing the purchasing is designated in writing.
- ☐ Purchasing/product specifications are written and used.
- ☐ "Special deals" are questioned.
- ☐ All purchasing is planned (budgeted) and controlled.

RECEIVING:

- ☐ Person receiving is **NOT** the person who orders. (The person ordering can assist with receiving, but he/she cannot sign forms to "receive" the goods.)
- ☐ Persons receiving are designated in writing.
- ☐ Deliveries are checked for accurate weight, number, price, temperature, condition, etc. (Managers should spot check.)
- ☐ Shipping/receiving documentation is accurate and complete.
- ☐ Return/credit policy is in effect.
- ☐ Delivery times are established and enforced.

STORAGE:

- ☐ All items are stored as quickly as possible. (Frozen products should be stored immediately; all others as quickly as possible. (E.g., produce, fruits, meat, poultry, fresh seafood, dry/canned grocery items, paper supplies, chemicals, cleaning supplies, etc.)
- ☐ The first in, first out (FIFO) method is used.
- ☐ All items are dated and priced. (Aids with inventory.)
- ☐ Access to inventory is limited to authorized personnel.
- ☐ Storage areas are secure and controlled.
- ☐ Storage areas are kept clean, dry, and in good repair.

FOOD COST CONTROL CHECKLIST (cont.)

SECURITY:

- ☐ Access doors are locked.
- ☐ Storage areas are locked.
- ☐ Key controls are in place and used rigorously.

INVENTORIES:

- ☐ Sensitive items are inventoried at least weekly.
- ☐ Inventory procedures are accomplished according to policy.
- ☐ Discrepancies/losses are investigated, acted upon, and guarded against.

RECIPES:

- ☐ Standardized recipes are used.
- ☐ Conversions are calculated accurately.
- ☐ Recipes are costed out at least every 3 - 6 months. (See Task 5.5, Evaluate Current Fees, Prices and Charges.)

MENU PRICING:

- ☐ Recipe cost-cards are calculated from current prices.
- ☐ Menu mix is designed to achieve the desired Cost of Goods percentage.
- ☐ Portion sizes are priced correctly.
- ☐ Prices are calculated using the Cost of Goods Method in accordance with Task 5.5.
- ☐ All self-serve items are figured into menu prices. (Catsup, mustard, relish, etc.)

FOOD COST CONTROL CHECKLIST (cont.)

PORTIONING:

- ☐ Portions are standardized and calculated correctly.
- ☐ Correct serving and portioning utensils are available and used.
- ☐ Correct portion cups, bags, containers, etc., are used.

WASTE/SPOILAGE:

- ☐ All spilled, spoiled, and unusable items are recorded.
- ☐ Preparation pans are scraped to ensure full use of product.
- ☐ Usable by-products/leftovers are used, **NOT** thrown out.
- ☐ Correct yield is obtained from produce with minimal waste.
- ☐ Preparation/Pull Par levels are accurate and used.
- ☐ Standardized recipes are used.
- ☐ Correct preparation methods are used.
- ☐ Correct thawing, holding, and handling procedures are used.
- ☐ Temperatures are monitored and maintained in refrigerators, freezers, and on the steam/service lines.

SALES CONTROLS:

- ☐ Everything leaving the kitchen/service area is rung up or documented according to local policy.
- ☐ All food items prepared, but **NOT** sold, are recorded, calculated, and accounted for in Cost of Goods Sold percentages according to local policy.
- ☐ Promotional coupons or discounts are recorded under gift certificates or advertising and promotions according to local accounting policy.
- ☐ Employee meals, sodas, etc. are accounted for per local policy.

Step 3 Periodically track food usage with a Food Cost Variance Report. (Use the following sample report to create a report to meet your needs.)

- **Item (A).** List food items. (E.g., hamburgers, hot dogs, chicken breasts, etc.)
- **Expected Usage (B).** Beginning Inventory + Purchases/Issues - Ending Inventory = Expected Usage.
- **Actual Sold (C).** Total of the food item sold as recorded on the Point of Sale (POS) report, scatter sheets, or other local records **(C)**.
- **Unit Variance** (D). The difference between Expected Usage **(B)** and Actual Sold **(C)**.
  - If Expected Usage **(B)** is more than Actual Sold **(C)**, there is a shortage "[-]".
  - If Actual Sold **(C)** is **more** than Expected Usage **(B)**, there is an overage "[+]".
- **Unit Cost (E).** Unit cost of each item unit taken from menu item cost card.
- **Cost Variance (F).** Calculate by multiplying the Unit Variance **(D)** by Unit Cost **(E)**.

FOOD COST VARIANCE REPORT

(A) Item	(B) Expected Usage	(C) Actual Sold	(D) Unit Variance +/(-)	(E) Unit Cost ($)	(F) Cost Variance $) +/(-)
Hamburger Patties	350	315	-35	$.40	-$14.00
Chicken Breasts	120	112	-8	$.68	-$5.44
Roast Beef	15 lb	10 lb	-5 lb	$2.80	-$14.00
Hot Dog	110	120	+10	$.16	+$1.60

SAMPLE

NOTE: This report is used to track high cost and highly pilferable items on a regular basis between inventories. We suggest checking these weekly and more often if Cost of Goods are too high.

Step 4 Identify possible cause(s) of variance(s) and initiate corrective action(s).

IF VARIANCE IS:	AND POSSIBLE CAUSE(S) IS/ARE:	INITIAL CORRECTIVE ACTION TO TAKE SHOULD BE:
Negative (-). (Expected usage is more than **actual sold**.)	Incorrect POS ring up.	Train POS users on correct ring up procedures.
	Incorrect inventory.	1. Re-count the inventory items that have sold less than expected. 2. Spot check inventories of high usage items on a random and frequent basis. 3. Ask staff members using inventory to account for missing products.
	Excessive spoilage/waste.	1. Check for over production. 2. Use Daily Prep Sheets. 3. Use spoilage/waste tally sheets.
	Over portioning.	1. Ensure staff members are trained in portion control. 2. Ensure staff members have the correct size portioning utensils.
	Pilferage or Spoilage.	1. Ensure all security measures are in place. 2. Maintain inventory levels at no higher than par levels.
Positive (+). (Actual sold is greater than **expected usage**.)	Incorrect POS ring up.	Train POS users on correct ring up procedures.
	Incorrect paperwork.	Check paperwork for math errors.
	Incorrect inventory.	1. Re-count the inventory items that have sold more than expected. 2. Spot check inventories of high usage items on a random and frequent basis.
	Under portioning.	1. Ensure staff members are trained in portion control. 2. Ensure staff members have the correct size portioning utensils.

Step 5 Compare actual food cost with budgeted or COGS guidelines/goals.

IF ACTUAL FOOD COST IS:	THEN:
At or **LOWER** than budget or COGS guidelines/goals.	1. STOP. 2. Continue monitoring food costs.
HIGHER (more than 2%) than budget or COGS guidelines/goals.	Continue with Step 6.

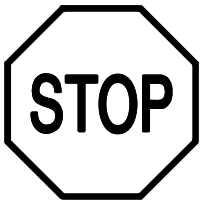
Step 6 Determine possible causes of unacceptable/high food COGS and take applicable corrective actions.

IF YOU SUSPECT THE CAUSE OF HIGH COGS IS:	POSSIBLE CORRECTIVE ACTIONS INCLUDE:
Too Many Leftovers.	• Daily Food Prep Sheet amounts are correct per recipe cards. • Standardized recipes are used. • Conversions are accurate. • Daily forecasts are being done.
Incorrect portioning.	• Employees are trained on correct portioning. • Correct service/measuring devices are used. • There are no giveaways or over-portioning. • Correct size containers are available and used.
Waste/spoilage.	• Waste/spoilage documentation reviewed daily. • Pans/containers are scraped of all usable products. • Usable leftovers and by-products are not thrown out. • Correct thawing, holding, and cooking procedures and temperatures are used.
Incorrect pricing.	• Recipes are costed/priced-out every 3 - 6 months. • Prices are set to meet required food cost percentage. • Sharp/unusual increase in price by vendor/ supplier is accounted for. • Prices are calculated accurately. • All condiments are included in prices.

Step 6 (cont.)

IF YOU SUSPECT THE CAUSE OF HIGH COGS IS:	POSSIBLE CORRECTIVE ACTIONS INCLUDE:
Poor security.	• Key control procedures are used. • Losses/discrepancies are investigated. • Access to storage is controlled. • Storage areas are locked.
Purchasing procedures.	• Standard operating procedures are written and followed. • "Special deals" from vendors are in fact good deals. • All purchasing is planned and controlled. • Accurate/current specifications are being used.
Receiving and storage.	• All deliveries are checked for weight, size, count, condition, temperature, price, and match ordering documents. • Documentation is accurate for returns or credits and other discrepancies. • Delivery times are enforced. • Deliveries are stored immediately.
Sales procedures.	• All food leaving kitchen/service area has been rung up or accounted for. • Employee meals, sodas, etc., are recorded or accounted for. • All items are rung up or accounted for.
Bookkeeping error.	• All paperwork discrepancies are reviewed with accounting office and corrected. • Items are posted to the correct account. (For example, soda may have been posted to bar instead of food.)
Pilferage/theft.	• All items rung up on register or accounted for. • No food is being taken or given away. • Variance reports are used and monitored.

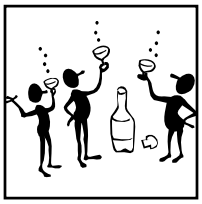
Step 7 Monitor variance reports and cost of goods and make necessary adjustments and/or take appropriate actions to correct discrepancies/problems.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD and BEVERAGE OPERATIONS

TASK 12.5



Select Bar Stock/Standardize Drink Recipes

DO THIS TASK WHEN

- Establishing a new bar/beverage operation.
- Changing the current bar/beverage operation to increase sales/profit and/or to reduce costs.
- Accomplishing a business downsizing or consolidation.
- Changes or revisions of the current beverage stock is needed to provide quality products.
- You need to standardized the way drinks are prepared to ensure consistency for your customers/patrons.

REFERENCES

- MCO P1700.27 (series), MCCS Policy Manual.
- MCO 1700.30, (series), Marine Corps Business Operations Program.
- NAVMC 2714 (series), Marine Corps Club System Operations Manual.
- Planning and Control for Food and Beverage Operations, Jack D. Ninemeier, Ph.D., CHA, Educational Institute of the American Hotel & Lodging Association, Lansing, MI, 5th edition, 2001.

SUPPLIES/ RESOURCES

- Data collection instruments. (E.g., surveys, questionnaires, focus group worksheets, survey software, etc.)
- A list of all current bar/beverage stock/products you sell.
- Current customer service preference data.
- Customer comment cards.
- Drink recipes from any of the following:
  - Bar Guide (e.g., Plotkins, Boston).
  - Current recipes on Rolodex file cards.
  - Drink recipe software program.
- Calculator.
- General office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- Your business decisions are based on valid, up-to-date needs/preferences data gathered by questionnaires, surveys, document reviews, interviews, focus groups, etc., from your current and potential customers/patrons and other stakeholders.
- The beverage menu/product list for both well-stock and customer call-stock is comprised of quality brand name products, only.
- Customers/patrons receive quality beverages, consistently prepared.
- Beverage selections, daily operations, staff knowledge, and staff behavior meet and/or exceed customer/patron expectations.
- The beverage menu maximizes profits while providing high quality products at competitive prices.

NOTES

Most people today know that proper diet, regular physical activity, recreation and leisure activities, and socializing are the basics of healthy living. Accordingly, customers/patrons are more demanding and discriminating than ever when it comes to the leisure activities, events, products and services we provide. They expect and demand quality and consistency in everything they purchase and do.

Your customers/patrons *must* have input into the beverage items you provide. Collecting, considering, and whenever possible, using their preferences is key to sales and to your reputation via word-of-mouth referral. Since business success depends on consistently providing customers/patrons with products and services they want, it is both logical and important that they have input about the selection of beverage brands, labels and drinks you provide.

While information from your *current* users is important, collecting data from only them limits the information you need to make good business decisions. You also need to know who is NOT using your facility--and why.

The Desk Reference set addresses all aspects of MCCS Program, business and office operations. This Task will help you prepare to set up a new bar operation or upgrade an existing one. In addition to the beverage selection steps in this Task, Duty 1.0, Assess Needs will help you identify customer/ patron needs, preferences, opinions, and perceptions. We have included a sample, beverage and entertainment-specific survey in this Task for information purposes only.

Your local marketing department should be able to help you set up and administer hard copy and electronic surveys and questionnaires; develop and distribute data collection instruments appropriate to your operation; and collect, compile, analyze, and interpret the customer/patron demographics and preference data.

NOTES (cont.)

Customer/patron preference data can be obtained from:

- Staff knowledge of customer preferences, patterns, and habits.
- Historical sales data, comment cards, suggestions, etc.
- Focus groups, face-to-face surveys, and phone surveys.
- Electronic and hard copy, mail-out questionnaires/surveys.
- Industry trends, data and related information.

The return rate of questionnaires/surveys is typically improved by offering incentives for completing and returning the Customer/Patron Surveys. (E.g., small gifts, discount coupons, etc.)

This task has two parts:

1. **Select Bar Stock.** Steps 1 through 12 ensure you provide identifiable/recognizable quality brands/ products.

2. **Standardize Drink Recipes.** Steps 13 through 16 ensure you give your customers/patrons what they expect every time they order.

Remember: When selecting/naming drinks; you must comply with both local and higher authority directives on standards of entertainment and ethics. Many drink names used in the private sector are not to be used in military beverage operations as established by USMC/USN policy. **Avoid using sexist, vulgar, or discriminatory drink names.**

In addition, you have a role in ensuring that customers/ patrons use alcoholic beverages responsibly at your facility or event. Every member of your staff is required to attend *approved* training in responsible use and sales of alcoholic beverages.

To comply with Marine Corps requirements, ensure that one ounce (1 oz) of liquor is the standard shot size and that no single drink contains no more than two ounces (2 oz) of liquor. (Direct questions to MRK.)

MARINE CORPS ASSISTANCE

MCCS (MRK), Business Activities Branch, is available to assist you with standardizing your food and beverage operation.

Their assistance includes menu development and display, production and service line design, operational and administrative management, and on-the-job training.

MCCS (MRK) can provide information and assistance with the mandatory training of employees in responsible use and sales of alcoholic beverages.

PROCEDURE

SELECT BAR STOCK; Steps 1 through 12

Step 1 Collect data to identify your customer's/patron's beverage preferences, spending habits, and service expectations.

> **NOTE:** Refer to Task 1.2, Design/Develop Data Collection Instruments for guidance on preparing and administering questionnaires/surveys. The first five Tasks in Duty 1.0, Assess Needs thoroughly cover how to prepare for and conduct a needs assessment.
>
> *Before* administering a survey, ensure the data it solicits will enable you to make appropriate beverage selections and other appropriate business decisions. There's no sense asking questions when you either can't understand, or do anything with the answers.

☐ Distribute surveys to key department heads and command leaders. Ask that they distribute the surveys to *randomly selected* authorized customers/patrons. (See Task 1.1, Plan To Conduct Local Needs Assessment for information about random/representative sampling.

☐ Start with a minimum distribution of 100 questionnaires/surveys. (If your customer base is very small, 100 or less, survey 100% of the customers.)

> **NOTES:** The sample survey on pages 12.5.11 through 12.5.15 is for demonstration purposes only. Your questionnaire/survey instrument will probably be different.
>
> Your customers/patrons will have definite opinions about speed of service, hours of operation, cleanliness, price/value, etc. Their preferences and opinions may significantly influence your beverage selections, customer service practices, and daily operations.
>
> **Example:** If your data indicates that *paying $X.XX for a particular beverage is more than they are willing to pay* then that item should not be included in your selections.
>
> Task 4.4, Ensure Extraordinary Customer Service provides extensive customer service information and guidance and should be completely reviewed and used for all MCCS Programs.

Step 2 Gather all data from recently completed surveys, questionnaires, focus group results, comment cards, etc.

NOTE:	The customer/patron survey example used in this task can be used for any Beverage and Entertainment Program. The steps in this Task are based on the sample data collected from the example survey. If you have a completed survey for your operation the steps should be the same.

Step 3 Review the data collection instruments, discarding any that you consider invalid.

Reasons include:

- Incomplete answers on surveys, questionnaires, etc.
- Illegible answers on surveys, questionnaires, etc.
- Questions answered in obvious jest or other useless ways.
- Survey instructions were misunderstood/ignored.
- Collection boxes stuffed.
- Data manipulated.

Step 4 Decide if you have a sufficient number of usable surveys or get more returns.

IF THE NUMBER OF RETURNED USEABLE SURVEYS IS:	THEN
Sufficient.	Continue with Steps 6.
NOT sufficient.	Go to Step 5 and collect additional data.

NOTE:	To be confident in the data you need to collect the number of usable and reliable questionnaires/surveys you identified in Step 1. "Usable and reliable" refers to questionnaires/surveys or other data collected that is complete, legible, and free of obvious invalid entries. Continue distributing and collecting data by mail, person-to-person, survey software, etc. as needed.

Step 5 Continue distributing and collecting questionnaires/surveys until you have the appropriate number of *usable and reliable* surveys.

Step 6 Use a blank questionnaire/survey as a master sheet to tally responses from all returned surveys.

- ☐ Record and total number of responses for each item.
- ☐ Consolidate written responses on the master sheet, adding additional sheets if necessary.

Step 7 Tally the needs/preference responses and calculate response percentages.

- ☐ By sorts/selected groupings.
- ☐ Record on tally cards as shown in the example below, on a computer, or on a blank copy of the survey instrument itself. (See example on next page.)
- ☐ Review and tally, one manageable pile/grouping at a time.
  - Although this process is tedious, it is paramount to the completion of this task.
  - If you have access to analysis software, your ability to tabulate and cross-tabulate is significantly enhanced and the time consuming manual chores are comparatively reduced. Follow the data entry and processing instructions appropriate to the software application being used.

Number of group-related <u>responses</u>:	_____ (A)
Divided by total group-related <u>respondents</u>:	_____ (B)
Multiplied by 100 equals response percentage:	_____ (C)

$$\frac{A}{B} \times 100 = C$$

BEVERAGE AND ENTERTAINMENT
CUSTOMER/PATRON SURVEY, page 1 of 5

Activity High 5 Club **Date** 2/14/XX

Thank you for taking the time to complete this survey. Your information will help us provide the quality activities, events, products and services you prefer.

Please check the appropriate box(es) that best describe you, your products and service preferences, and your spending habits.

This example is based on 54 valid returns.

1. What is your age?

22 ☐ 18 to 24
10 ☐ 25 to 29
4 ☐ 30 to 34
8 ☐ 35 to 44
6 ☐ 45 to 54
4 ☐ 55 +

2. Where do you live?

12 ☐ Aboard ship
18 ☐ BOQ/BEQ/BQ
10 ☐ On-base housing
9 ☐ Off-base (less than 30 minutes)
5 ☐ Off-base (more than 30 minutes)

3. How often do you visit this facility?

27 ☐ Once a week
6 ☐ 2 time a week
1 ☐ 3 plus times a week
16 ☐ Once a month
4 ☐ 2 times a month
4 ☐ 2-3 times a year

4. How do you rate the current quality of the beverages you purchase here?

4 ☐ Great
27 ☐ Good
20 ☐ Average
3 ☐ Poor

5. How quickly do you expect to be served your beverage?

12 ☐ 1-3 minutes
24 ☐ 3-5 minutes
16 ☐ 5-7 minutes
2 ☐ 7-10 minutes
0 ☐ 10+ minutes

6. How long does it usually take to receive your order?

8 ☐ 1-3 minutes
25 ☐ 3-5 minutes
19 ☐ 5-7 minutes
2 ☐ 7-10 minutes
0 ☐ 10+ minutes

SAMPLE

BEVERAGE AND ENTERTAINMENT
CUSTOMER/PATRON SURVEY, page 2 of 5

7. When placing your order, how often are you greeted in a genuine, friendly, and courteous manner that makes you feel recognized?

18 ☐ Always 20 ☐ Sometimes
4 ☐ Seldom 2 ☐ Never

8. Based on personal experience and/or observation, are customer concerns/complaints handled courteously?

5 ☐ Always 41 ☐ Sometimes
5 ☐ Seldom 3 ☐ Never

9. How do you rate the consistency of the drinks you ordered?
(I.e., Is the taste, temperature, and appearance the same?)

6 ☐ Great 16 ☐ Average
30 ☐ Good 2 ☐ Poor

10. How do you rate the cleanliness and appearance of the facility?

CLEANLINESS:
0 ☐ Great 26 ☐ Average
21 ☐ Good 7 ☐ Poor

APPEARANCE:
1 ☐ Great 20 ☐ Average
28 ☐ Good 5 ☐ Poor

11. Do the employees perform their jobs with knowledge and confidence?

KNOWLEDGE:
18 ☐ Always 24 ☐ Sometimes
12 ☐ Don't know 0 ☐ Never

CONFIDENCE:
27 ☐ Always 22 ☐ Sometimes
9 ☐ Don't know 0 ☐ Never

12. Please rank/prioritize your top THREE music choices:
(1 = prefer the most, to 3 = prefer the least)

23 ☐ Contemporary/Top
25 ☐ Classic Rock 3
8 ☐ Oldies 2
19 ☐ Country 6
28 ☐ Wrap/Hip-Hop 1
22 ☐ High Energy/Techno
20 ☐ Urban R&B
12 ☐ Heavy Metal
5 ☐ Alternative 4
0 ☐ Other 5 _____

The circled numbers indicate priority.

SAMPLE

BEVERAGE AND ENTERTAINMENT
CUSTOMER/PATRON SURVEY, page 3 of 5

13. How did you hear about entertainment activities offered at this base? Select top THREE choices.
(1 = prefer the most, to 3 = prefer the least.)

- 25 ☐ MCCS newsletter
- ☐ Radio
- 18 ☐ Bulletin boards on-base
- 35 ☐ Base newspaper
- 18 ☐ Marquees/Billboards
- 36 ☐ Friends (word of mouth)
- ☐ Television
- ☐ Coworkers
- 30 ☐ Local newspaper
- ☐ Other _____

14. How would you rate the overall quality of the nightclub/entertainment services on base?

- 11 ☐ Very Good
- 22 ☐ Good
- 17 ☐ Adequate
- 6 ☐ Poor
- 2 ☐ Very Poor

15. Generally speaking, why would you go to a Marine Corps entertainment facility?

- 0 ☐ Cost less than off-base
- 4 ☐ More convenient than off-base
- 0 ☐ Better than off-base
- 11 ☐ Be with friends
- 0 ☐ Only facility available
- 26 ☐ Get away from home/barracks
- 1 ☐ Esprit de corps with unit
- 0 ☐ More welcome than off-base
- 12 ☐ No Transportation

16. Check preference in on-base entertainment. Rank in order, your top THREE choices.
(1 = prefer the most, 3 = prefer the least.)

- 47 ☐ Live Music/Bands (1)
- 36 ☐ Recorded Music/DJ (2)
- 30 ☐ Dancing (3)
- 9 ☐ Sports Bars (6)
- 12 ☐ Video Games/Pinball (5)
- 6 ☐ Comedy (7)
- 22 ☐ Movies (4)

162 Total Checks

17. When you do go out?

- 32 ☐ Almost exclusively on weekends
- 16 ☐ More often on weekends
- 4 ☐ About equal
- 2 ☐ More often on weekdays
- 0 ☐ Almost exclusively on weekdays

SAMPLE

BEVERAGE AND ENTERTAINMENT
CUSTOMER/PATRON SURVEY, page 4 of 5

18. What are the most important factors you consider when selecting a place for entertainment? Rank in order, your top THREE choices.
(1 = most important, 3 = least important.)

40 ☐ Good music 1
18 ☐ Good service 5
25 ☐ Variety of entertainment 3
10 ☐ Convenient location 7
28 ☐ Good value/reasonable prices 2
21 ☐ Atmosphere 4
3 ☐ The make-up of the crowd 8
17 ☐ Meet new people 6

162 Total Checks

19. What type of nightclubs, bars, lounges, or entertainment facilities do you prefer? *Even if these are not currently available in your area*, rank in order, your top THREE choices.
(1 = prefer the most, 3 = prefer the least.)

30 ☐ Local Pub/Bar 3
46 ☐ Night Club 1
34 ☐ Live Music Club 2
20 ☐ Karaoke 4
17 ☐ Sports Bar 5
2 ☐ National Franchise Pub/Bar
12 ☐ Game/Billiard Parlor
2 ☐ Private Club (Country Club)
☐ Other 6

162 Total Checks

SAMPLE

20. When you go out to a facility listed in question 19, how much do you usually spend on yourself?

0 ☐ Less than $5
12 ☐ $10 - $15
8 ☐ Over $20
3 ☐ $5 - $10
31 ☐ $15 - $20

21. Why do you go to clubs, bars, or lounges? Select ONE choice.

8 ☐ Dancing 3
20 ☐ Listen to live music 1
6 ☐ Relax after work 4
2 ☐ Special occasion 5
9 ☐ Social Interaction 2
6 ☐ Live entertainment 4
3 ☐ Watch sports events
0 ☐ Other _____

22. What type of beverage do you generally order? (When at any facility listed in question 19?) Select ONE.

22 ☐ Beer 1
11 ☐ Mixed Drink (Cocktails, etc.) 2
6 ☐ Soda/Juice/Other 3
4 ☐ Malt alternatives 4
3 ☐ Wine/Cooler 5
6 ☐ Non-alcoholic Beer/Smoothies 7
2 ☐ Liqueurs/Cordials 6

BEVERAGE AND ENTERTAINMENT
CUSTOMER/PATRON SURVEY, page 5 of 5

23. What type of bottle/draft beer do you prefer? Select ONE.

DRAFT:

20 ☐ Domestic Regular (1)
10 ☐ Domestic Light (2)
7 ☐ Imported Regular (4)
8 ☐ Imported Light (3)
6 ☐ Non-Alcoholic (5)
3 ☐ Micro Brew (6)

BOTTLE:

19 ☐ Domestic Regular (1)
18 ☐ Domestic Light (2)
9 ☐ Imported Regular (4)
7 ☐ Imported Light (3)
1 ☐ Non-Alcoholic
0 ☐ Micro Brew

24. What changes could we make to increase your use of beverage and entertainment services on base?

SAMPLE

Step 8 Select your beer stock based on the survey results.

☐ Ensure you include at least one beer selection from each of the following beer categories to provide a wide variety.

- Draft.
- Light. (Bottled and draft.)
- Non-alcoholic.
- Micro brews. (Bottled and draft.)
- Malt Alternatives. (E.g., hard cider, lemonade, etc.)

☐ Include local/regional preferences. (E.g., micro brews, regional favorites.)

Consider:

- Customer requests.
- Bartender/Server/Staff input.
- Assessment of local competition.
- Historical data from current operation or other base operations.

NOTE: Local distributors will be eager to assist you in identifying the best selling name brands in your area. They have a vested interest in making sure that they are able to supply you with those products on a regular basis.

Consider the following stocking guidelines:

4-6 Domestic draft/bottles/cans.	1-2 Light.
2-4 Premium/Imported.	1-2 Micro Brew.
1 Non-Alcoholic.	1 Malt Alternatives.

Step 9 Use the selection list on the following page to select your liquor stock.

- ☐ Select one liquor stock from the **Well Brands** column for each liquor category.
- ☐ Select one or more liquor stocks from the **Call Brands** column for each liquor category.
- ☐ Select one or more liquor stocks from **Premium Brands** column for each liquor category.

Quality brands and number of selections should be based on:

- Sales volume.
- Customer/patron preference.
- Sales history.
- Availability by bottle versus case.
- Area/regional favorites.
- Recipe requirements.

NOTE: The liquor selection list on the following page ensures high quality selections. You should not use the cheap ("rot-gut") liquor in your well. In the long run, it's not good business.

Encourage your Bartenders to tell customers which brands are used as standard well stock.

When possible select/purchase liquor stock in the following sizes:

- 1 liter bottles for hand pouring.
- 1.75 liter bottles for liquor guns/towers.

LIQUOR SELECTION LIST			
CATEGORY	**WELL BRANDS**	**CALL BRANDS**	**PREMIUM BRANDS**
BLENDS	N/A	☐ Seagram's 7 ☐ Black Velvet ☐ Canadian Mist	N/A
BOURBONS	☐ Early Times ☐ Old Crow ☐ Hiram Walker Ten High	☐ Jim Beam ☐ Early Times ☐ Old Crow	☐ Jack Daniel's Black ☐ Makers Mark ☐ Wild Turkey ☐ Old Grand Dad
SCOTCHES	☐ Inver House ☐ Passport ☐ Smugglers ☐ Ushers	☐ J & B ☐ Johnny Walker Red ☐ Dewar's	☐ Chivas Regal ☐ Johnny Walker Black ☐ Glenfiddich ☐ Glenlivet
GINS	☐ Fleischmanns ☐ Seagrams ☐ Gilbeys	☐ Beefeaters ☐ Tanqueray ☐ Bombay	☐ Bombay Saphire ☐ Tanqueray No. 10
VODKAS	☐ Gilbeys ☐ Gordons ☐ Relska ☐ Popov ☐ Wolfschmidt	☐ Luksowa ☐ Smirnoff	☐ Absolut ☐ Stolichnaya ☐ Skyy
RUMS	☐ Castillo ☐ Ronrico	☐ Bacardi ☐ Captain Morgan ☐ Myers ☐ Mount Gay	☐ Gran Blasón ☐ Bacardi 8
TEQUILAS	☐ Pepe Lopez ☐ Montezuma ☐ Matador	☐ Jose Cuervo Gold ☐ Suaza Gold	☐ Herradura ☐ Suaza Commertivo ☐ Jose Cuervo 1800
CANADIANS	N/A	☐ Canadian Club ☐ Seagrams VO	☐ Crown Royal ☐ Tangle Ridge
IRISH WHISKIES	N/A	☐ Jameson ☐ Old Bushmills	☐ Bushmills Malt ☐ Dunfeys
BRANDIES/ COGNACS	☐ Christian Brothers ☐ El Presidente ☐ E & J	☐ Martell VS ☐ Hennessy ☐ Courvoisier	☐ Remy Martin VSOP ☐ Alize V. S.

Step 10 Use the selection list below to select your liqueurs/cordials.

NOTE:	At a minimum, stock at least one of each of the liqueurs/cordials listed. Add other selections as needed to meet local drink recipe requirements.

LIQUEURS/CORDIALS	
STANDARD CORDIALS	☐ Amaretto (Almond-apricot) ☐ Bailey's Irish Cream ☐ Grand Marnier ☐ Kahlua ☐ Southern Comfort ☐ Triple Sec
OPTIONAL CORDIALS	☐ Assorted Schnapps, (e.g. Peach, Peppermint, Cinnamon) ☐ B&B ☐ Chambord ☐ Cointreau ☐ Drambuie ☐ Flavored Brandies ☐ Goldschlagger ☐ Jeagermiester ☐ Rumple Minze ☐ Sambuca ☐ Tia Maria

Step 11 Select the house wines you plan to sell.

Base your selections on the following:

- Sales volume.
- Customer preferences.
- Sales history.
- Availability by bottle versus case.
- Area/regional favorites.
- Drink recipe requirements.

HOUSE WINE	
IF YOU PLAN TO SELL:	**CONSIDER THE FOLLOWING TYPES:**
White Wine	☐ Chablis ☐ Chardonnay
Red Wine	☐ Cabernet Sauvignon ☐ Burgundy ☐ Merlot
Pink	☐ Rose ☐ Blush ☐ White Zinfandel

NOTE:	Wines carried in inventory/stock to be sold by the bottle should reflect the customers'/patrons' preferences in label, vintage, variety, and price.

Step 12 Monitor sales and customer/patron preferences and make adjustments to your bar stock as needed.

☐ Discontinue slow selling stock.

☐ Make limited purchases of new products and test for customer acceptance before adding as permanent stock.

STANDARDIZE DRINK RECIPES; Steps 13 through 16

NOTE:	The bar operation's drink list is its list of standard, popular, and frequently requested drinks. The beverage menu will typically include a selection of specialty and/or theme drinks that the operation wants to promote. There are many sources for drink recipes: menu books, industry trends/suggestions, recipe software, vendor/manufacturer recipes, customer/patron recipes, etc. The purpose of the following steps is to standardize the way drinks are mixed to ensure consistency and quality, not to establish a Marine Corps system-wide, standardized drink list or menu.

Step 13 Select drinks to include on the drink list for your operation.

☐ Use input from the following sources:

- Customer requests/preferences.
- Sales history.
- Vendor/supplier recommendations.
- Drink recipes. (E.g., Plotkins, Boston Bar Guide, etc.)
- Current "trend" drinks.

☐ Selected drinks should be based on:

- Customer requests.
- Drinks served by your competitors.
- Bartender/Server/Staff input.
- Historical data from your current operation and other base operations.
- Design theme of the operation, if any.

Step 14 Use one of the industry standard recipe systems for your operation that is both accessible and easy for your staff to use.

Example:

- The Bartender's Companion (book and software).
- Robert Plotkins, Bartender's Companion.
- The Boston Bar Guide.
- Bar Back software.
- The Bartender software.
- Behind Bars software.
- Bar None (web-based), etc.

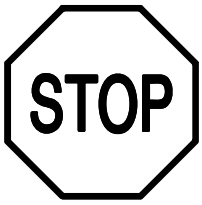
Step 15 Use written recipes and training to ensure your bartenders and staff are able to prepare drinks correctly, accurately and consistently.

Consider using:

- A computer or web-based recipe program.
- Alphabetized/tabbed recipe book(s).
- Rolodex.
- Index cards.

Step 16 Adjust drink recipes based on customer/patron feedback and on societal and industry trends.

NOTE:	Make adjustments to ensure all recipes have 1 ounce shot measures and a 2 ounce maximum total alcohol content in compliance with USMC/USN requirements.



Congratulations! You've completed this task.

MCCS MANAGERS' DESK REFERENCE
DUTY 12.0 - MANAGE FOOD and BEVERAGE OPERATIONS

TASK 12.6

Control Beverage Costs

DO THIS TASK WHEN

- Accomplishing your daily responsibilities as a manager/ supervisor of a beverage operation/activity.
- You have responsibility for control of sensitive, high value, and/or typically pilfered supplies/products.
- Examining or implementing controls to prevent or minimize loss of your supplies, resale products, equipment, cash, and near cash, etc.
- Ensuring that the receipts for beverages balance with amounts of supplies/products used.
- Complying with local or higher level instruction or policy.
- COGS are greater than guidelines or goals for your operation.

REFERENCES

- MCO P1700.27A (series), MCCS Policy Manual.
- DoDI, 1015.15 (series), Procedures for Establishment, Management, and Control of Nonappropriated Fund Instrumentalities and Financial Management of Supporting Resources.
- MCO 1700.30 (series), Marine Corps Business Operations Program.

SUPPLIES/ RESOURCES

- Checklists used to manage your beverage operation.
- Beverage cost variance report.
- Current and prior month's financial statements.
- General office supplies.

THIS TASK IS DONE CORRECTLY WHEN

- A system is in place to monitor COGS.
- COGS are within goals or guidelines.
- Profit margins are maximized because costs are controlled.
- Control procedures minimize or prevent loss of your supplies, resale products, equipment, cash, and near cash, etc.

NOTES

There are two main purposes for a retail sales business.

- The first purpose for a retail sales business is to generate income. Income received from the sale of products and services is called the "top line". Attention to all aspects of your business that contribute to sales is critical. You will find procedures throughout this desk reference to help maximize your top line figures.
- The second purpose for a retail sales business is to generate a profit. Profit is the income left after "expenses" have been deducted. This is generally referred to as the "bottom line". In order to achieve an acceptable and sometimes required bottom line, you must control expenses.

NOTES (cont.)

This occurs by paying attention to and controlling your supplies, resale products, equipment, cash, and near cash, etc.

The focus of this Task is controlling costs. Specifically, *minimizing/eliminating* losses of your supplies, resale products, equipment, cash, and near cash, etc.

An effective internal control system is a safeguard against fraud, waste, and abuse of government assets. Establishing control of any Program's assets is more than good business practice--it is adhering to official policy.

The size of the operation, sales volume, and other business elements will determine the complexity of the procedures necessary to control assets, inventory, sales, and costs.

This Task provides steps to help you control the COGS in your bar operation. An additional and effective method of controlling your costs is *"management by walking around"*. Remember to inspect what you expect.

Review all of Duty 7.0, Manage Supplies and Equipment for in-depth guidance on inventory management, controlling shrinkage, and property/asset management.

Review Task 5.4, Analyze Financial Statements for guidance on financial analysis and controlling COGS and Tasks 5.6 through 5.10 for guidance on cash handling, change fund and petty cash fund management, daily close out, and conducting surprise cash counts.

Review Task 8.5, Ensure Proper Disposal of NAF/APF Property, Equipment and Vehicles, and Task 8.6, Ensure Proper Disposal of Lost/Stolen Property, Equipment or Vehicles for guidance on NAF and APF lost/stolen/damaged property disposal and disposition.

Duty 6.0, Manage Staff provides guidance on important all staff/personnel issues.

NOTES (cont.)

This Task gives guidance on the following three procedures:

- Use Beverage Cost Control Checklists, Steps 1 - 4.
- Complete a Retail Accountability/Variance Report, Steps 5 - 11.
- Establish/Maintain Efficient Production Flow, Steps 12 - 13.

PROCEDURE

USE BEVERAGE COST CONTROL CHECKLISTS; Steps 1 through 4

Step 1 Make a list of the areas in your beverage operation that require regular monitoring to prevent loss due to fraud, waste, abuse, theft, or carelessness.

Typically, they are the following:

- Purchasing.
- Receiving.
- Storage.
- Security.
- Inventories/inventorying.
- Recipes.
- Pricing.
- Portion control.
- Waste/spoilage/spillage.
- Sales controls.

NOTE: Controlling beverage cost is an *every* day process. A manager/ supervisor has to frequently walk through the operation to ensure the operating procedures, outlined in this desk reference, are being used.

Things to look for include:

- Employees following established procedures.
- Products meeting standards.
- Customer/patron needs and expectations are met/exceeded.

Step 2 Use or adapt the Beverage Cost Control Checklist on the following pages to check the areas most important/applicable to controlling costs in your operation.

NOTE: The following checklist is comprehensive, but not exhaustive. Every area listed needs some form of control. Most controls should be included in the staff's Position Descriptions (PDs) or assigned to applicable staff members. The manager's responsibility is to provide the best and most reasonable monitoring and controls systems and methods possible and to ensure each staff member accomplishes his/her control assignments.

BEVERAGE COST CONTROL CHECKLIST

Purchasing:

- ☐ Person doing the purchasing is designated in writing.
- ☐ Purchasing/product specifications are written and used.
- ☐ "Special Deals" are questioned.
- ☐ All purchasing is planned (budgeted) and controlled.

Receiving:

- ☐ Person receiving is NOT the person who orders. (The person ordering can assist with receiving, but cannot sign forms to "receive" the goods.)
- ☐ Persons receiving are designated in writing.
- ☐ Deliveries are checked for accurate weight, number, price, temperature and condition. (Managers should spot check.)
- ☐ Shipping/receiving documentation is accurate and complete.
- ☐ Return/credit policy is in effect.
- ☐ Delivery times are established and enforced.

Storage:

- ☐ All items are stored as quickly as possible. (Chilled, frozen and perishable products should be stored immediately; all others as quickly as possible.)
- ☐ The first in, first out (FIFO) method is used.
- ☐ All items are dated and priced. (Aids in inventory.)
- ☐ Access to inventory is limited to authorized personnel.
- ☐ Storage areas are secure and controlled.
- ☐ Storage areas are kept clean and in good repair.

BEVERAGE COST CONTROL CHECKLIST (cont.)

Security:

- ☐ Access doors are locked.
- ☐ Beer taps are locked.
- ☐ Storage areas are locked.
- ☐ Liquor cabinets are locked.
- ☐ Key controls are in place and used rigorously.

Inventories:

- ☐ Sensitive items are inventoried at least weekly.
- ☐ Inventory procedures are accomplished according to policy.
- ☐ Discrepancies/losses are investigated, acted upon, and guarded against.

Recipes:

- ☐ Standardized recipes are used.
- ☐ Conversions are calculated accurately.
- ☐ Recipes are costed out at least every 3 - 6 months. (See Task 5.5, Evaluate Current Fees, Prices and Charges.)

Pricing:

- ☐ Prices are calculated from current cost cards using the Cost of Goods Method presented in Task 5.5, Evaluate Fees, Prices and Charges.
- ☐ Portion sizes are correct.
- ☐ Proper glassware is used.
- ☐ Correct measures, containers, etc., are available and used.

BEVERAGE COST CONTROL CHECKLIST (cont.)

Portioning:

- ☐ Portions are accurately calculated and used.
- ☐ Correct utensils are available and used.
- ☐ Correct portion jiggers, pourers, etc. are available and used.
- ☐ Correct measures, containers, etc., are available and used.
- ☐ Proper glassware is used.

Waste/Spoilage/Spillage:

- ☐ All spilled/spoiled/unusable items are recorded.
- ☐ Garnishes are cut to correct size.
- ☐ Correct yield is obtained from produce. (E.g., lemons, limes, etc.)
- ☐ Bar par levels are accurate and used.
- ☐ Correct mixing and pouring methods are used.
- ☐ Temperatures are monitored and maintained in refrigerators, freezers, and chill boxes.
- ☐ All bottles/kegs are completely emptied before discard/exchange/return.

Sales controls:

- ☐ Everything leaving the bar service area is rung up and/or documented according to local policy.
- ☐ Employee sodas, etc. are accounted for according to local policy.
- ☐ Retail Accountability/Variance Reports are completed regularly.
- ☐ Policies regarding staff drinking are established, monitored and enforced.

Step 3 Take appropriate actions on problems/discrepancies found during checklist use.

- ☐ Make corrections on the spot.
- ☐ Revise and update the checklist as/when needed.

Step 4 Monitor all areas affecting beverage cost of goods using appropriate checklist in Step 2.

COMPLETE A RETAIL ACCOUNTABILITY/VARIANCE REPORT; Steps 5 through 11

Step 5 Determine how often to complete a Retail Accountability/Variance Report.

NOTE: A Retail Accountability/Variance report identifies differences between expected and actual income. The procedure is used to ensure products are tracked in terms of sales or use at a particular location. The procedure can be used in most situations where retail sales exist. In this Task it is used as a tool to track inventory product usage and sales at a bar operation. At a large bar operation that has more than one bar station bartender/cashier each station should complete an accountability report.

Retail Accountability/Variance reports may be done as a full report (total bar inventory) or as a partial report limited to a specific inventory category (e.g., beer, well-stock, wine etc.).

We have provided a blank form at the end of this task that can be adapted and used for the 'stubby pencil" method. The form is also provided as an Excel file that includes applicable formulas. (This file is located in the forms folder on your desk reference CD.) In both cases the tedious part is entering the items, unit cost, etc., but once done adjustments will be simple.

Bar Par and Tare Weight (bottle weight) is data that may or may not be needed for your reports. Tare weight becomes an issue only when bar inventory is taken by weighing the bottles.

IF SALES AVERAGE:	AND:	THEN:
$1,000 or more a day.	→	Do a full report daily.
UNDER $1,000 a day.	There is minimal or no increase in COGS over last report. (Less than 3%.)	1. Do a full report either: • Weekly. **- OR -** • Monthly (as part of month end inventory). 2. Continue with Step 6.
	There is a 3% or more increase in COGS over last month or last report.	1. Do a partial report daily on selected items like: • Draft beer. • Well stock. • 3 or 4 premium liquors. 2. Do a full report: • Weekly. • Monthly (as part of month end inventory). 3. Continue with Step 6.

NOTE: There may be other appropriate times and conditions for doing a Retail Accountability/ Variance Report. Consider doing one whenever you suspect losses due to:

- Staff members drinking.
- Theft.
- Not charging for drinks.

Step 6 Complete a Retail Accountability/Variance Report.

IF YOU:	THEN:
Have a spreadsheet program.	1. Follow the program directions. 2. Continue with Step 7.
Do **NOT** have a computerized program.	1. Get a copy of the Retail Accountability/Variance Report at the end of this Task. 2. Use the instructions in the following steps and complete the Retail Accountability/Variance Report. **NOTE:** An example is found on the following pages.

NOTE: A Retail Variance Accountability spreadsheet is located on the CD provided with this Desk Reference. It includes the formulas you will need to complete a Retail Accountability/Variance Report.

RETAIL ACCOUNTABILITY/VARIANCE REPORT FORM INSTRUCTIONS

NOTE:
- Items **(H), (J), (L), (N), (P), (Q), (R), (U), (V),** and **(W)** are calculated automatically by the Excel program provided on disk with this desk reference.

☐ Enter header information **(A)**:

- Bar number.
- Category.
- Location.
- Page number.
- Activity.
- Date.

☐ Enter Bar Par **(B)**.

☐ Enter item by brand name **(C)**.

☐ Enter issue unit **(D)**. Use the unit used in recipes or as sold. (E.g., ounce, bottle, etc.)

☐ Enter tare weight **(E)**. Tare weight is the weight of the empty bottle (sometimes with pour measure attached).

☐ Enter beginning inventory **(F)**. Use last inventory or report data.

☐ Enter issues **(G)**. Issues are the total units added since last inventory or report.

☐ Calculate and enter Subtotal **(H) = (F) + (G)**.

☐ Enter the ending inventory (the current amount on hand) **(I)**.

☐ Calculate and enter Amount Used **(J) = (H) - (I)**.

☐ Enter Cost Per Issue Unit **(K)**. (This is the cost per, ounce, bottle, **(D)** of the item in column **(C)** see Task 5.5 - Evaluate Current Fees, Prices and Charges.).

RETAIL ACCOUNTABILITY/VARIANCE REPORT
FORM INSTRUCTIONS (cont.)

- ☐ Calculate and enter Total Cost **(L) = (J) x (K)**.
- ☐ Enter sell price **(M)**.
- ☐ Calculate and enter Total sales **(N) = (J) x (M)**.
- ☐ Column Totals **(O)**. This is the sum of columns **(F), (G), (H), and (I)**.
- ☐ Total Cost **(P)** (total of column **L**).
- ☐ Total Sales **(Q)**. This is the total of column **(N)** and is the **Expected Income**.
- ☐ Enter Expected Income into **(R)** from **(Q)**.
- ☐ Enter register/POS tape reading **(S)**.
- ☐ Enter adjustments **(R - S)** to tape reading for over/under rings, errors, etc. **(T)**.
- ☐ Enter Actual Income **(U) = (S +/- T)**.
- ☐ Calculate and enter Over/Short % **(V)** (difference between R and U ÷ expected bar income (R) x 100).
- ☐ Enter Cost of Goods % **(W)**. Total Cost **(P)** ÷ Expected bar income **(R) x 100**.
- ☐ Enter bartender name at **(X)**.
- ☐ Enter inventory caller and recorder names at **(Y)**.
- ☐ Enter remarks and notes (from DAR, problems on shift, etc.) at **(Z)**.

BAR#: _____

CATEGORY: _____

LOCATION: _____

ACTIVITY: _____

(A)
BAR RETAIL ACCOUNTABILITY

Page _____ of _____

Date _____

(BAR RETAIL ACCOUNTABILITY-INVENTORY BY OUNCES/EACH)

Bar Par	Liquor Brand	Issue Unit	Tare Wt	Beg Inv	Issues	Sub-total	End Inv	Amt Used	Cost per issue unit	Total Cost	Sell Price	Sales
2 Lt	Seagram's 7	oz	18	82	99	181	83	98	$0.28	$27.44	$2.25	$220.50
2 Lt **(B)**	Canadian Club **(C)**	**(D)** oz	**(E)** 19	**(F)** 94	**(G)** 66	**(H)** 160	**(I)** 93	**(J)** 67	**(K)** $0.40	**(L)** $26.80	**(M)** $2.25	**(N)** $150.75
4 Lt	Jim Beam	oz	18.5	112	66	178	83	95	$0.21	$19.95	$2.25	$213.75
4 Lt	Old Crow	oz	19	128	33	161	74	87	$0.19	$16.53	$2.25	$195.75
4 Lt	Dewars White Label	oz	19	118	0	118	99	19	$0.28	$5.32	$2.25	$42.75
4 Lt	Cutty Sark	oz	19	115	33	148	83	65	$0.53	$34.45	$2.50	$162.50
4 Lt	Gilbey's Gin	oz	18.5	119	66	185	103	82	$0.23	$18.86	$2.50	$205.00
4 Lt	Beefeater	oz	25	135	66	201	112	89	$0.46	$40.94	$2.50	$222.50
6 Lt	Stolichnaya Vodka	oz	22.5	227	33	260	76.5	183.5	$0.46	$84.41	$2.50	$458.75
5 Lt	Bacardi Rum	oz	19	156	0	156	74	82	$0.28	$22.96	$2.25	$184.50
4 .75	Jose Cuervo Silver	oz	22	115	0	115	56	59	$0.29	$17.11	$2.25	$132.75
					0	0	0	0		$0.00	$0.00	$0.00
					0	0	0	0		$0.00	$0.00	$0.00
		(O)		**Beg Inv**	**Issues**	**Sub total**	**End Inv**	**Used**		**Cost**		**Sales**
Column Totals				2638	1121	3805	2102.1	1702.4		$684.90 **(P)**		$4,111.25 **(Q)**

SAMPLE

Expected Income	**(R)**		$4,111.25
Tape Reading	**(S)**		$4,126.25
Adjustments	**(T)**	**+ or (-)**	-$15.00
Actual Income	**(U)**		$4,111.25
Over/Short	**(V)**		$0.00
Percentage			0.00%
Cost of Goods %	**(W)**		16.66%

Bartender: **(X)** _____

Inventoried By:

Caller: **(Y)** _____

Recorder: _____

Remarks: **(Z)**

BAR#
: _____

CATEGORY: _____

LOCATION: _____

ACTIVITY: _____

BAR RETAIL ACCOUNTABILITY

Page _____ of _____

Date _____

(BAR RETAIL ACCOUNTABILITY-INVENTORY BY OUNCES/EACH)

Bar Par	Liquor Brand	Issue Unit	Tare Wt	Beg Inv	Issues	Sub-total	End Inv	Amt Used	Cost per issue unit	Total Cost	Sell Price	Sales
				Beg Inv	Issues	Sub-total	End Inv	Used		Cost		Sales
Column Totals												

Expected Income	
Tape Reading	
Adjustments + or (-)	
Actual Income	
Over/Short Percentage	
Cost of Goods %	

Bartender: _____

Inventoried By:

Caller: _____

Recorder: _____

Remarks:

Step 7 Review the Retail Accountability/Variance Report and determine if a variance exists and requires action.

IF VARIANCE BETWEEN EXPECTED INCOME AND ACTUAL INCOME IS:	THEN:
5% or more.	Continue With Step 8.
Less than 5%.	Continue With Step 9.

Step 8 Determine possible cause(s) of variance and take corrective action. Use the Beverage Cost Control Checklist in Step 2 of this Task in addition to checking the following:

- ☐ All entries on Retail Accountability/Variance Report forms are accurate. (E.g., tare weights, ounce per bottle, selling price, etc.)
- ☐ POS/register procedures for key use and readings are correct.
- ☐ Correct procedures for storage control and movement of products (transfers/issues), are being followed.
- ☐ Inventory procedures are accurate.

Step 9 Compare actual COGS figure on variance report to the budgeted COGS guidelines or goals.

IF VARIANCE BETWEEN ACTUAL AND BUDGETED COGS FIGURE IS:	THEN:
3% or more.	Continue With Step 10.
Less than 3%.	Continue With Step 11.

Step 10 Use the following table and determine the actions needed to resolve variances between actual and budgeted COGS guidelines and goals.

IF YOU SUSPECT DIFFERENCE IS DUE TO:	THEN:
Accounting error.	1. Review statement with accounting. 2. Have accounting make adjustments if necessary.
Inaccurate inventory procedures.	1. Require bottles to be weighed/measured daily. 2. Keep like items together. 3. Check for correct pricing & units. 4. Check count/call/verification procedures.
Spillage, waste, or over pouring.	1. Retrain on pour procedure. 2. Provide correct measure devices. 3. Use spotters. 4. Ensure procedure to account for spillage and waste is used.
Inefficient cash register system.	1. Upgrade system to computerized POS. 2. Train employees on POS use.
Errors in transactions at POS/register.	1. Illuminate POS/register area. 2. Color-code the register keys. 3. Require receipts to guest. 4. Check POS/register is working/programmed correctly. 5. Over/under rings documented. 6. Ensure prices are by category.
Theft. **-OR-** Stock brought in illegally.	1. Mark all stock for identification. 2. Conduct surprise cash counts. 3. Use spotters to look for giveaways. 4. Ensure strict key control. 5. Keep stock out of guest reach. 6. Provide containers for empties. 7. Use spotters/surveillance cameras.
Employee(s) drinking on duty.	1. Observe. (Use spotters and/or video systems.) 2. Document occurrences. 3. Take disciplinary action.
Sales/Inventory variances.	1. Buy POS that will compute accurate variances. 2. Ensure correct pull/pour methods used. 3. Check for: ☐ Accurate cost/pricing. ☐ Correct line/keg temp. ☐ Correct glassware used. ☐ Advertising, promotion, giveaways recorded. ☐ Kegs metered and weighed. 4. Increase frequency of variance reports.

Step 11 Monitor the Retail Accountability/Variance Reports to identify variances and unacceptable COGS percentages.

ESTABLISH/MAINTAIN EFFICIENT PRODUCTION FLOW; Steps 12 and 13)

NOTE:	The efficiency of the production flow from the time a beverage is ordered to the time it is delivered will depend on the bar stock layout and the service area setup. The sample Speed Bar setup/layout illustration that follows this task, is designed to produce beverage items efficiently.

Step 12 Evaluate your operation's current production flow against the following criteria to determine if the production flow can produce all beverage items within acceptable times as indicated by comment cards, surveys, etc.

CRITERIA:

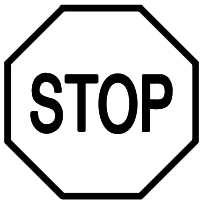
- ☐ Equipment layout allows one person to work each station.
- ☐ Equipment layout allows more than one person to work comfortably, efficiently and safely.
- ☐ Everything needed to assemble/mix any beverage is within easy access (two steps) of the bartender.
- ☐ Adequate storage (regular and chilled) is provided on service line.
- ☐ Beverages are assembled/mixed and delivered (where possible) in a straight line. (I.e., without going backwards and forwards before completed.)
- ☐ Speed bar(s) are located to best take advantage of bar and table service.
- ☐ Cash POS/register system is located on bar back area.
- ☐ Frequently ordered liqueurs and cordials are located on the lower shelves.
- ☐ Beverages can be ordered and received within customer/patron time expectations. (Usually no more than three minutes.)
- ☐ Staff members are provided with all utensils/small-wares needed at the workstations.

Step 12 (cont.)

IF CURRENT PRODUCTION FLOW	AND MCCS IS:	THEN:
Meets the efficient production flow/equipment layout criteria.	→	Continue with Step 13.
Does **NOT** meet the efficient production flow/equipment layout criteria.	Willing to Invest money to design a more efficient production flow.	1. Contact the MCCS Business Activities through your chain of command for assistance with equipment layout and service area setup. 2. Continue with Step 13.
	NOT willing to invest money to design a more efficient production flow.	Make one or more of the following adjustments: • Drop slow selling beverage items from the menu. • Simplify the production steps. (E.g., use pre-prepared products, mixes, etc.) • Continue with Step 13.

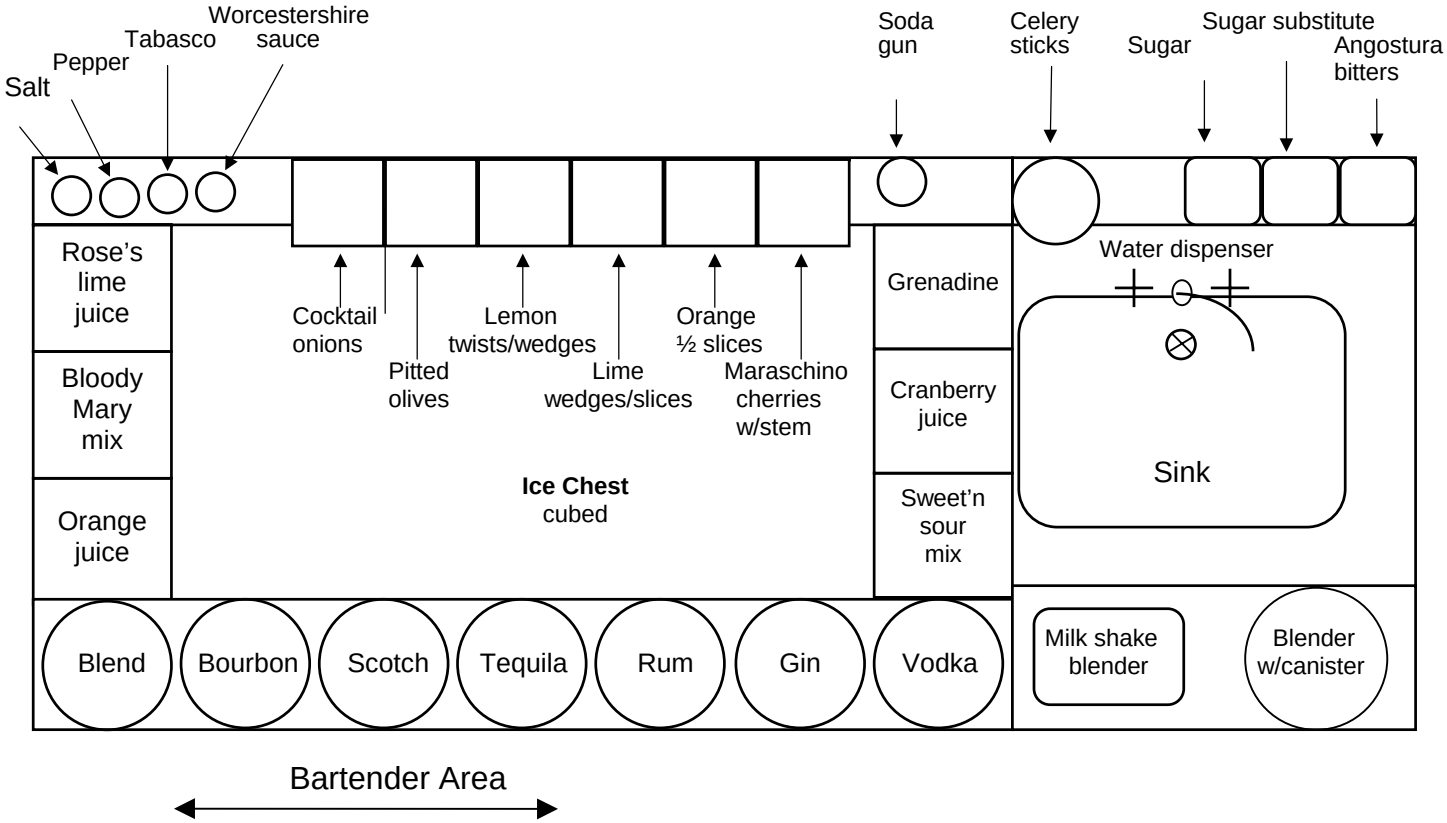
Step 13 Monitor production flow and setup to ensure efficiency.

IF:	THEN:
Customer waits more than 3 minutes. **- OR -** Employees are bumping into one another when getting orders out.	Consider one of the following: • Adjust the production flow. • Adjust the production method. • Schedule more help. • Add more stations.
Products are running out.	1. Recalculate the bar par of these products.
Production flow and setup are efficient.	**Great! Stop here.**



Congratulations! You've completed this task.

EXAMPLE



Grapefruit juice / Pineapple juice
½ & ½ Cream / Simple syrup
Stored in back bar

Speed Bar (Jockey Box) Set-up / Layout

BAR# : _____

CATEGORY: _____

LOCATION: _____

ACTIVITY: _____

BAR RETAIL ACCOUNTABILITY

Page _____ of _____

Date _____

(BAR RETAIL ACCOUNTABILITY-INVENTORY BY OUNCES/EACH)

Bar Par	Liquor Brand	Issue Unit	Tare Wt	Beg Inv	Issues	Sub-total	End Inv	Amt Used	Cost per issue unit	Total Cost	Sell Price	Sales
				Beg Inv	Issues	Sub-total	End Inv	Used		Cost		Sales
Column Totals												

Expected Income	
Tape Reading	
Adjustments + or (-)	
Actual Income	
Over/Short Percentage	
Cost of Goods %	

Bartender: _____

Inventoried By:

Caller: _____

Recorder: _____

Remarks: