DEPARTMENT OF THE NAVY
NAVY RECRUITING DISTRICT, PORTLAND
7028 N.E. 79TH COURT
PORTLAND, OREGON 97216-2813
NACRUITDISTPORTLANDINST 1040.5E
CMC
30 Jul 13

NACRUITDIST PORTLAND INSTRUCTION 1040.5E

Subj: CAREER DEVELOPMENT BOARD (CDB) PROCESS

Ref: (a) NAVPERS 15878J, Career Counselor Handbook
     (b) NAVPERS 15560D, MILPERSMAN
     (c) BUPERSINST 1430.16F
     (d) OPNAVINST 1040.11D
     (e) OPNAVINST 1420.1E

Encl: (1) Career Development Board (CDB) Procedures
      (2) Career Development Board (CDB) Info Sheet
      (3) Career Development Recommendation Sheet
      (4) Individual Career Development Plan (ICDP)

1. Purpose. To provide procedures and assign responsibilities for the command's Career Development Board (CDB) process. The CDB process encompasses the administrative review and counseling of all enlisted Sailors in order to maximize career potential and ensure they have the opportunity to attain positions of greater responsibility, consistent with Navy manning requirements. The CDB process will further act as a quality control for the professional development of all enlisted Sailors.

2. Cancellation. NACRUITDISTPORTLANDINST 1040.5D.

3. Discussion. To provide for a rewarding career, all Sailors must enhance their professional, technical, and leadership skills to remain competitive for advancement and be eligible for retention. The CDB proactively employs tools which include the evaluation system, Navy training, incentive programs, the detailing process, voluntary education opportunities, and commissioning programs. Although these resources are already available, few Sailors are thoroughly knowledgeable of how the various career tools interact. Most Sailors rely on their in-rate seniors and designated command retention team representatives to ensure they are on track. The CDB provides information and guidance concerning the various processes, programs and training the Navy has to offer to facilitate...
military career success. While it is necessary for those designated, key personnel to provide guidance, individual Sailors must ultimately take responsibility for the success of their own careers.

4. **Background.** Emphasis must be placed on assisting every enlisted Sailor in career planning by matching individual aspirations with program requirements.

5. **Action**

   a. **Commanding Officer.** Ensure that the CDB is fully effective in providing each Sailor the best possible advice and guidance. Review each CDB report to remain appraised of personnel development and the CDB process.

   b. **Executive Officer.** Ensure that an effective CDB program is in place and operates efficiently. Personally review each CDB report, endorsing all proposed actions and providing support to strengthen the CDB recommendations. Ensure actions required at the command level are completed in due course.

   c. **Department Heads**

      (1) Provide endorsement or input, as appropriate, for personnel appearing before the CDB.

      (2) Ensure active participation by Leading Chief Petty Officers/Leading Petty Officers and Division Officers.

      (3) Develop follow-up procedures to ensure CDB recommendations are accomplished.

   d. **Command Master Chief (CMC)**

      (1) Act as Chairperson of the CDB. Responsible for the overall coordination and efficient operation of the board. Upon completion of the board, forward all CDB recommendations to the Commanding Officer via the Executive Officer and Department Head.

      (2) Ensure that the required membership is present for each meeting of the board, per paragraph 6.
e. **Command Career Counselor (CCC)**

1. Coordinate and schedule all personnel appearing before the Command CDB.

2. Coordinate with the Administrative Department in the submission/tracking of all 1306 personnel action requests.

3. Maintain a tickler system to ensure personnel are reviewed at required intervals in accordance with the Career Counselor Handbook.

4. Participate as a technical advisor to the CDB, providing service record information as well as information contained in appropriate directives.

5. Maintain files of all CDB recommendation sheets.

6. Ensure all CDBs are recorded in CIMS.

f. **Leading Chief Petty Officers (LCPOs)**

1. Ensure that requirements to appear before the CDB are met as directed in this instruction.

2. Provide professional support to enlisted Sailors who work within their divisions/departments.

3. Follow up on board recommendations and required correspondence related to approved recommendations.

4. Act as board representative during CDB meetings when directed by CMC.

g. **Leading Petty Officers (LPOs)**

1. Ensure station Sailors are provided an opportunity to appear before the CDB.

2. Submit recommendations to the Command Career Counselor for consideration by the CDB.
(3) Discuss the provisions of this instruction with all newly reporting Sailors during the "reporting" interview, as required by reference (a).

(4) Attend all CDBs (in person or telephonically) with assigned station Sailors.

  h. **Pass Liaison Representative (PLR).** Provide personnel records and information required for review by the CDB.

  i. **Educational Services Officer (ESO).** Ensure all pertinent advancement criteria and advancement statistics are available to the CDB.

  j. **Divisional Career Counselors (DCC)**

   (1) Coordinate and schedule all personnel appearing before the Divisional CDB.

   (2) Maintain a tickler system to ensure personnel are reviewed at required intervals in accordance with the Career Counselor Handbook.

   (3) Participate as an advisor to the CDB and record CDB minutes to be recorded and submitted to CCC on enclosure 3.

   (4) Maintain files of all CDB recommendation sheets.

   (5) Ensure all Divisional CDBs are recorded in CIMS.

6. **CDB Composition**

   a. **Command CDB**

   (1) **Chairperson.** The CDB is chaired by the CMC. In his/her absence, the senior enlisted service member (excluding the CR/ACR) will act as chairperson.

   (2) **Members.** At a minimum, the board shall be comprised of the following: Division Officer, Command Career Counselor, LCPO, and Division Career Counselor.
b. Department/Divisional CDBs

(1) Chairperson. The CDB is chaired by the DLCPO. In his/her absence, the senior enlisted service member in the division will act as chairperson.

(2) Members. At a minimum, the board shall be comprised of the following: Division Officer, Divisional Career Counselor and LPO.

7. Command CDB. Command-level CDB will be conducted for all Sailors within 30 days of reporting. Additionally, candidates will appear before the CDB for the following reasons/requests:

a. Recommended by Division CDB.


c. Sailors who are 24 months prior to high year tenure (HYT) and those requesting HYT waivers.

d. Special programs, as required.

e. Commissioning program applications.

f. Not approved for in-rate reenlistment or conversion.

g. Transfer/separation as required.

h. Sailors may attend for other reasons and upon member’s request.

6. Department/Division Career Development Board. Professional growth and goal setting is the key to enhanced career planning and motivation. Candidates will appear before the Department/Division CDB as follows:

a. Six-month (first-term Sailors only), 12-month, 24-month, 36-month, 48-month, and 60-month intervals.

b. Transfer/separation, as needed.
c. Special programs.

d. Career Navigator Program - Career Waypoints (C-way) denied quota (x3).

e. CMS/ID (13 months prior to PRD).

f. Advancement examination PNA (x3), standard score of 40 or below, or non-selection for E4/E5/E6.

g. Sailors may attend for other reasons and upon member’s request.

9. Responsibilities. The CDB will provide each Sailor with advice, information and guidance concerning the candidate’s future career options and best course of action to maximize goal attainment. The CDB will make its recommendations based on the candidate’s qualifications and desires. The board is designed to provide expertise in complicated rating entry, advancement, and special program requirements issues not normally available at the supervisory level. The board will meet as required and scheduled by the Command Career Counselor with approval of the CMC. Each CDB member must be familiar with enclosure (2).

10. Candidates eligible/required to appear before the CDB

   a. Personnel will be assigned to appear before the CDB by the Command Career Counselor, with approval of the CMC. Every reasonable effort will be made to conduct the CDB in person. Additionally, the member’s immediate supervisor (LPO/LCPO) will be present at the recruiting station for the CDB. For personnel assigned to divisions 3, 4, 5, 6, CDBs may be held via conference call with the CMC and CCC if unable to conduct the board in person. Immediate supervisors will be responsible for obtaining enclosure (3) of this instruction and reviewing it with the member prior to the CDB. Although the list of questions on enclosure (3) may not be all-inclusive, it should provide the basis for a dialogue on all aspects of the member’s career and professional development. This will ensure that the member is ready with any questions from the board and that the board length will not exceed 30 minutes.
b. Additionally, Sailors who are not demonstrating professional growth will appear before the CDB to ensure the member has been afforded the maximum opportunity for in-rate training or other opportunities for professional development. The following list is provided as a guide and is not intended to be all-inclusive.

(1) Sailors E-3 to E-5 who do not promote to the next higher paygrade within three, eight or 12 years of their active duty service date (respectively), or who fail the advancement exam.

(2) First class petty officers not selected for Chief petty officer after being board eligible two consecutive years, and those not achieving a selection board eligible score or failing the E7 examination.

(3) Chief petty officers and senior chief petty officers who were not selected for the next higher pay grade and are within two years of HYT.

c. Any person identified who does not fall into the above categories but who needs career development counseling at the discretion of his/her chain of command should be scheduled for a CDB.

11. Recommended Annual Scheduling Requirements. In addition to the scheduling requirements set forth in paragraph 8, the following annual scheduling requirements should be adhered to:

a. June/January. Review all Sailors who either failed or received a PNA score for the third time on the E4 through E6 March or September examination cycles, and review personnel who advanced.

b. April. Review all Sailors who either failed the advancement exam or who were selection board ineligible from the CPO examination.
c. August. Review Sailors who failed to select for CPO.

T. D. BODE

Copy to:
NAVCRUITSUBPORTLANDINST 5216.1U
Lists A, B, C, and D
Career Development Board (CDB) Procedures

1. After scheduling notification of a CDB, Divisional career counselors are to ensure enclosure (2) is complete and filled out three business days prior to CDB. Additional documents provided for specific CDBs are as follows:

   a. Reporting CDB. Last two evaluations, to include transfer evaluation.
   
   b. Advancement CDB. Last two profile sheets.
   
   c. Commissioning Program. Rough draft of package for submission.
   
   d. CMS/ID. LaDR for rate/rank.
   
   e. C-way. Last five evaluations and CDB information sheet.

2. After all preparations are complete and the candidate is before the board, the chairperson will introduce the board members and explain to the candidate the purpose of the CDB. Enclosure (4) will be utilized.

3. The chairperson should control the interview and allow each member of the board to ask questions of the candidate.

4. The command-level CDB should discuss the information listed below with each member, as applicable.

   a. Individual and command expectations.
   
   b. Initiate/review Individual Career Development Plan.
   
   c. Desire for further service and the application and assignment procedures.
   
   d. Career intentions at EAOS (extend/reenlist/separate).
   
   e. Rating conversion.
   
   f. Voluntary education programs.

Enclosure (1)
g. Career Navigator Program.

h. OMPF review.

i. Collateral duties.

j. Short-term/long-term goals.

k. Websites of interest. (LaDR, Navy Cool, NPC)

l. Thrift Saving Plan (TSP).

m. Commissioning programs.

n. United Services Military Apprenticeship Program (USMAP).

5. The department level CDBs should discuss the following topics, as applicable:

   a. Introduction/purpose of the CDB.
   
   b. Individual and department expectations.
   
   c. Initiate/review Individual Career Development Plan.
   
   d. Websites of interest.
   
   e. PQS progress/in-rate training.
   
   f. Next assignment.
   
   g. Retirement/Fleet Reserve.
   
   h. Career Status Bonus (CSB).
   
   i. Thrift Saving Plan (TSP)
   
   j. Commissioning programs.
   
   k. United Services Military Apprenticeship Program (USMAP).

6. Interview personnel to determine:

   a. Is the individual on track with his/her naval career?
b. Does the individual have a desire for a particular rate? (for non-designated Sailors)

c. Why does the individual feel they are not achieving professional growth?

d. Why is the individual requesting a rating conversion?

e. What is the individual's potential for commissioning programs?

f. What are the individual's professional and personal short-and long-term goals?
CDE INFORMATION SHEET

RATE _______ NAME ____________________________
STATION __________________________ DIVISION _________

REASON FOR CDB: ________________________________

DATE REPORTED: _______ PRD: _______ EAOS: _______

WARFARE QUAL: YES ____ NO ___ ADV ELIGIBLE: ☐YES ☐ NO

NAVAL LEADERSHIP CONTINUUM COMPLETED: ☐ N/A ☐ E5 ☐ E6 ☐ E7

NEXT ADVANCEMENT EXAM ELIGIBLE FOR: __________
- WHAT TYPE OF STUDY PREPARATIONS HAVE YOU DONE?
__________________________________________________

ENROLLED IN ACADEMIC COURSES (COLLEGE): ☐ YES ☐ NO ☐ N/A

- WHAT DEGREE PROGRAM? ________________
- IF NOT, PROVIDE REASON: __________________
- ARE YOU AWARE OF EXAM BENEFITS (POINTS) FOR A DEGREE? ______
- WHEN DID YOU BEGIN (MM/yr) ______________
- HOW LONG BEFORE COMPLETION
- ENROLLED IN UNITED STATES APPRENTICESHIP PROGRAM (USMAP):
☐ YES ☐ NO
- IF YES, WHEN DID YOU ENROLL. IF NO, PROVIDE REASON:
__________________________________________________

- ARE YOU FAMILIAR WITH NAVY CREDITIALING OPPORTUNITIES ON-LINE
(NAVY COOL)? ☐ YES ☐ NO

- HAVE YOU ENROLLED IN ANY NKO COURSES WITHIN THE LAST 3-6 MONTHS? ☐
YES ☐ NO

- IF YES, WHICH COURSE(S):

- LAST DATE YOU REVIEWED YOUR RECORD? _________________

- HAVE YOU VERIFIED THAT YOUR EVALS HAVE DAY-FOR-DAY
ACCOUNTABILITY? ________________

Enclosure (2)
COLLATERAL DUTIES: ____________________________

___________________________________________

CENTRAL INFORMATION SYSTEMS:

CAREER INTENTIONS: □ REENLIST □ EXTEND □ SEPARATE □ UNDECIDED

- IF REENLISTING OR EXTENDING, WHEN IS THE DESIRED DATE? __________

- ARE YOU FAMILIAR WITH CAREER NAVIGATOR PROGRAM/C-WAY? □ YES □ NO

- ARE YOU FAMILIAR WITH TIR (E7 & ABOVE) WAIVER PROGRAM? □ YES □ NO

- E7 ONLY - ARE YOU FAMILIAR WITH THE CONTINUATION BOARDS FOR E7-E9? □ YES □ NO

- ARE YOU FAMILIAR WITH SEA SHORE FLOW? □ YES □ NO

SHORT-TERM GOAL(S): PLEASE BE DESCRIPTIVE (DETAILS):

HOW DO YOU PLAN ON OBTAINING THESE GOALS?

LONG TERM GOAL(S):

HOW DO YOU PLAN ON OBTAINING THESE GOALS?

WHAT TYPE OF DUTY PLATFORM WOULD YOU REQUEST UPON COMPLETION OF RECRUITING DUTY?
DO YOU BELIEVE RECRUITING DUTY IS BENEFICIAL TO YOUR CAREER? EXPLAIN WHY OR WHY NOT?

ARE YOU IN YOUR 6-9 WINDOW TO NEGOTIATE FOR ORDERS? ☐ YES ☐ NO

HAVE YOU UPDATED YOUR DUTY PREFERENCE IN CMS-ID? ☐ YES ☐ NO

DLCPO/LCPO COMMENTS

EPO/DH COMMENTS

DATE CDB HELD: _______ EVAL/FITREP REVIEW COMPLETED _______ CMC INITIAL________

BOARD/CMC RECOMMENDATIONS/COMMENTS:
CAREER DEVELOPMENT BOARD (CDB) RECOMMENDATION SHEET

From:
To: Commanding Officer
Via: Executive Officer
Command Master Chief
Chief/Assistant Chief Recruiter
Command CCC

Subj: RESULTS OF THE CAREER DEVELOPMENT BOARD ICO
CM1(SCW/SW/AW) I. M. SAILOR CONDUCTED ON 5/6/13:

1. Board Members:

2. Board Comments/Recommendations:

   Member Input: Strengths:
   Weaknesses:

   LCPO Input: Strengths:
   Weaknesses:

3. Action Items
   Complete by next evaluation cycle:

Signature
*CDB Profile Sheet attached for routing

Enclosure (3)
1. ADVANCEMENT/QUALIFICATIONS:
   
   Time in Rate (TIR) ____________________________
   
   Date of Rate ____________________________
   
   Positive endorsement for advancement __________________
   
   Warfare qualifications ____________________________
   
   POS pursuing/completed ____________________________
   
   Recruiter Development Board completed/scheduled __________________
   
   Leadership Continuum completed/scheduled ________________
   
   Last digital service record review __________________

2. EDUCATIONAL OPPORTUNITIES:
   
   In-rate training completed and date (RTMs/HRPOs) ________________
   
   Education status ____________________________
   
   SMART transcript ordered/reviewed ____________________________
   
   Other courses completed ____________________________

3. FINANCIAL PLANNING:
   
   Individual/family budgeting ____________________________
   
   TSP ____________________________
   
   CSB ____________________________
   
   Other investments ____________________________

4. PHYSICAL FITNESS REQUIREMENTS/GOALS ____________________________

5. CAREER INTENTIONS:
   
   Reenlistment ____________________________
   
   C-way ____________________________
   
   Special Programs interest ____________________________
   
   Location interest ____________________________
   
   Career path/team detailing notes ____________________________
   
   Projected rotation date ____________________________
   
   Family relocation assistance ____________________________

6. TRANSITION:
   
   Individual transition plan ____________________________
   
   TAP class Scheduled ____________________________ yes/no
   
   Date: ____________________________
   
   Physical screening ____________________________
   
   Family relocation assistance ____________________________
   
   Pre-separation checklist completed ____________________________
   
   yes/no Date: ____________________________