

**USAREC Regulation 601-2**

**Personnel Procurement**

# **Management of Centers of Influence Events and Educator Tours**

**Headquarters  
United States Army Recruiting Command  
1307 3rd Avenue  
Fort Knox, Kentucky 40121-272  
25 June 2015**

**UNCLASSIFIED**

# ***SUMMARY of CHANGE***

USAREC Reg 601-2

Management of Centers of Influence Events This

revision, dated 25 June 2015—

- o Expands and clarifies the purpose of Center of Influence engagement activities.
- o Establishes the Enterprise Marketing Management System as the mandatory, automated system for requesting and processing Center of Influence Events (COI).
- o Replaces terminology referencing International Merchant Purchase Authorization Card (IMPAC) with Government Purchase Card (GPC).
- o Clarifies event funding limits to include use of local, per meal, per diem rates.
- o Establishes policy on grassroots outreach and working groups.
- o This regulation incorporates USAREC Regulation 601-81 (Educator/Center of Influence Program) in its entirety.
- o This regulation supersedes USAREC Reg 1-18 dated 31 January 1997.
- o Removes requirement for marketing activity code for COI events.

Headquarters  
United States Army Recruiting Command  
1307 3rd Avenue  
Fort Knox, Kentucky 40121-2725  
25 June 2015

## USAREC Regulation 601-2

Effective 25 June 2015

### Personnel—Procurement

#### Management of Centers of Influence Events

For the Commander:

BRIAN W. BASSETT  
Colonel, GS Chief of Staff

Official

  
Ronnie L. Creech  
Assistant Chief of Staff, CIO/G6

**History.** This is a complete revision of USAREC Regulation 601-2, which is effective 1 January 2015.

**Summary.** This regulation prescribes policies and procedures for the requisition, approval, conduct, and evaluation of educator tours and centers of influence (COI) events.

**Applicability.** This regulation applies to and is binding upon all individuals and commanders subordinate to Headquarters, United States Army

Recruiting Command. Exceptions to non-statutory provisions may be made by this command or Headquarters, Department of the Army. In case of conflict between this regulation and any other United States Army Recruiting Command publication setting forth procedures concerning center of influence events, this regulation will take precedence. Except as otherwise prohibited by law, Department of Defense directives, or Headquarters,

Department of the Army publications, this regulation applies to Army Reserve personnel on active duty and to Army National Guard personnel performing recruiting duties within this command.

**Proponent and exception authority.** The proponent of this regulation is the Assistant Chief of Staff, G7/9. The proponent may approve exceptions to this regulation that are consistent with controlling law and regulation. The proponent may delegate this approval authority, in writing, to the deputy director or a division chief within the proponent agency in the grade of GS-13.

**Army management control process.**

This regulation contains management control provisions in accordance with AR 11-2, but does not identify key management control that must be evaluated.

**Supplementation.** Supplementation of this regulation is prohibited.

**Relation to USAREC Reg 10-1.**

This publication establishes policies and procedures regarding the guidance and management of the U.S. Army Recruiting Command Management of Centers of Influence Events according to UR 10-1, para 3-17c(1).

**Suggested improvements.** Users are invited to send comments and suggested improvements on DA Form 2028 (Recommended Changes to Publications and Blank Forms) directly to HQ USAREC, ATTN: RCME-OO, 1307 Third Avenue, Fort Knox, KY 40121-2725.

**Distribution:** This publication is available in electronic media only and is intended for command level A.

\*This regulation supersedes USAREC Regulation 1-18 dated 31 January 1997

## **Contents** (Listed by Chapter and page number)

### **Chapter 1**

#### **Introduction**

Purpose • 1-1, *page 1*

References • 1-2, *page 1*

Explanation of abbreviations and terms • 1-3, *page 1*

### **Chapter 2**

#### **Responsibilities**

Assistant Chief of Staff, G 7/9 • 2-1, *page 1*

Chief, Outreach/Operations Division, ACofS, G7/9 • 2-2, *page 1*

Brigade Commanders • 2-3, *page 1*

Battalion Commanders • 2-4, *page 2*

Company Commanders • 2-5, *page 2*

Center Commanders • 2-6, *page 2*

Recruiters • 2-7, *page 2*

### **Chapter 3**

#### **Policy**

Program Authority • 3-1, *page 3*

Command Oversight • 3-2, *page 3*

Fund Utilization • 3-3, *page 3*

Spending Limits • 3-4, *page 3*

Small and Disadvantaged Business • 3-5, *page 3*

Recruiter Expense Allowance • 3-6, *page 3*

Recruiters • 3-7, *page 3*

Approved Functions and Purpose • 3-8, *page 3*

Grassroots Outreach and Working Groups • 3-9, *page 4*

Frequency • 3-10, *page 4*

Military and Civilian Employees • 3-11, *page 4*

Prohibitions • 3-12, *page 5*

### **Chapter 4**

#### **Educator/Center of Influence Program**

Objectives • 4-1, *page 5*

Policy • 4-2, *page 6*

Responsibilities • 4-3, *page 8*

Type of E/COI tours • 4-4, *page 12*

### **Chapter 5**

#### **Procedures • page 21**

### **Chapter 6**

#### **After Action Reports • page 21**

## **Table List**

Table 1: E/COI tour itinerary (recommend activities), *page 7*

Table 2: E/COI tour checklist, *page 9*

## **Figure List**

Figure 1: Sample of completed blank USAREC Form 601-2.3 for initial report, *page 13*

Figure 2: Sample of completed USAREC Form 601-2.3 for quarterly report, *page 14*

Figure 3: Battalion request for E/COI Tour approval, *page 15*

Figure 4: ACOM support request for E/COI tour, *page 15*

Figure 5: Letter of invitation to E/COI, *page 16*

Figure 6: Sample of completed USAREC Form 601-2.4, *page 17*

Figure 6a: Sample of completed USAREC Form 601-2.4 (page 2), *page 18*

Figure 7: Sample of E/COI tour AAR, *page 19*

Figure 8: E/COI additional tour request and approval, *page 20*

Figure B-1: Sample of completed USAREC Form 601-2.1, *page 24*

Figure C-1: Sample of completed USAREC Form 601-2.2, *page 26*

Figure C-1a: Sample of completed USAREC Form 601-2.2 (continued), *page 27*

Figure D-1: Example of COI Engagement Plan, *page 28*

## **Appendixes**

A. References, *page 22*

B. Instructions for Completion of USAREC Form 601-2.1, *page 23*

C. Instructions for Completion of USAREC Form 601-2.2, *page 25*

D. COI Events Checklist, *page 28*

E. Army Medical Department Educator/Centers of Influence Tour Program, *page 29*

## **Glossary**

## **Chapter 1**

### **Introduction**

#### **1-1. Purpose**

- a. This regulation prescribes policies and procedures for the requisition, approval, conduct, and evaluation of center of influence (COI) events.
- b. A COI event is an event where the primary purpose is engaging people of influence directly related to military recruiting and/or military advertising.
- c. The COI program is intended to create Army advocates through the participation in outreach events.
- d. COIs are those individuals who can help develop a better image of the Army, influence individuals to enlist in an Army Program, or refer names of leads to Army recruiters. They can be civic or business leaders (grassroots) educators, members of professional groups, groups of high school or college students identified as class leaders or influencers, news media representatives, nurses, convention officials or other influential individuals or groups.

#### **1-2. References**

Required and related publications and prescribed and referenced forms are listed in Appendix A.

#### **1-3. Explanation of abbreviations and terms**

Abbreviations and special terms used in this regulation are explained in the glossary.

## **Chapter 2**

### **Responsibilities**

#### **2-1. Assistant Chief of Staff, G7/9**

- a. Provides overall staff supervision, support, and management of the COI event program.
- b. Designates an approved marketing management system to nominate and track advertising related activities and events.
- c. Provides command oversight of the marketing management system (MMS) and establishes procedures for use.

#### **2-2. Chief, Outreach/Operations Division, ACofS, G7/9**

- a. Monitor and evaluate COI event programs.
- b. Process exception to policy requests for COI events exceeding authorized spending limits.

#### **2-3. Brigade Commanders**

- a. Designate a point of contact to administer the brigade COI event program.
  - (1) The point of contact (POC) will receive, consolidate, and forward reporting data, as appropriate.
  - (2) Designate a person to exercise “for the commander” authority to recommend and request exceptions to policy required of higher headquarters.
  - (3) Ensure USAREC Forms (UF) 601-2.1 (COI Event Request) and UF 601-2.2 (COI Event After Action Report) are digitally loaded into the USAREC approved, marketing management system for brigade level events.
  - (4) Submit request for exception to policy to Deputy Director, G7/9, Headquarters (HQ) US Army Recruiting Command (USAREC).
- b. Publish local policies to guide and assist subordinate commanders in planning COI events.
- c. Consider requests for high-cost events and special events and approve such requests in advance. Endorse and forward for approval to HQ USAREC for COI event requests expected to exceed spending limits.
- d. Include funding requirements for COI events in budget planning.
- e. Monitor COI events held within their organization and evaluate their effectiveness.
- f. Upon completion of event, verify UF 601-2.2 is digitally loaded into the marketing management system as an attachment. (see Appendix C).
- g. Provide a quarterly status report to HQ USAREC (RCME-OO), Fort Knox, KY 40121-2725. Report will consist of copies of all COI event logs and will show current balance and funds spent year-to-date.
- h. Brigade POC will ensure events are loaded correctly into the marketing management system with the heading COI. A master control log can be generated from MMS.

## **2-4. Battalion Commanders**

- a. Assign a staff member to manage the COI event program.
  - (1) The appointee must be a commissioned officer or civilian employee in grade GS-9 or above.
  - (2) The appointee will monitor the program, collect and forward data for reports, and advise the commander.
  - (3) The appointee will input all COI event aspects into marketing management system.
  - (4) The appointee will digitally load approved UF 601-2.1 into the system as an attachment.
  - (5) Upon completion of event, digitally load UF 601-2.2 into the system as an attachment.
- b. Plan and conduct COI events in accordance with USAREC marketing plans, operations orders, and brigade guidance.
  - c. Ensure follow up on leads and pledges of support.
  - d. Evaluate requests for COI events and approve requests in compliance with the intent of the program.
  - e. Evaluate and ensure justification for high dollar events is accurately entered into the detailed description block in MMS job starter.
  - f. Provide local guidance for procurement actions concerning COI events.
    - (1) Guidance must conform to policies and procedures of the servicing contracting officer and the supporting finance and accounting office.
    - (2) Review budget and accounting procedures regarding opportunities to capitalize on tax exempt status.
  - g. Direct the battalion education services specialist (ESS) to help plan education-related COI events, to include being a presenter at those events.

## **2-5. Company Commanders**

- a. Determine the need for COI events and establish procedures for execution.
- b. Request COI events not later than 45 working days prior to event execution.
- c. Inform the battalion ESS of needs and plans for COI events that involve educators.
- d. Ensure invitations have been issued and reminder calls are made so the meal count can be confirmed or adjusted with the vendor. Notify the battalion program manager as soon as it is known that attendance will be less than planned.
- e. Attend all COI events in their area of operation.
- f. Ensure the sponsor of the event or function submits required payment documentation and completed UF 601-2.2 to the battalion no later than the third working day after the event.
- g. Follow-up on COI pledges to support recruiting efforts.
- h. Evaluate the effectiveness of COI events. Complete and forward after-action reports to the battalion POC.

## **2-6. Center Leaders**

- a. Recommend persons to be invited from among school administrators, media contacts, mayors, Grassroots Program participants, Congressional representatives, civic and business leaders, healthcare executives, deans of medical, dental and nursing schools, prominent physicians, dentists, nurses, healthcare trade media, and chamber of commerce members.
- b. Ensure invitees have been notified and reminder calls are made at the ten day mark, three day mark and one day prior to the event to adjust the meal count. Notify the company commander as soon as a COI has declined in order to identify a replacement or to reduce the meal count for the event.
- c. If a recruiter has used Recruiter Expense Allowance (REA) funds, ensure recruiter has documented expenses.

## **2-7. Recruiters**

- a. Identify persons who promote or have offered to promote recruiting efforts within their area of operations.
- b. Maintain contact information on COI in Recruiter Zone (RZ). Records should include details on how the person might help recruiting efforts.
- c. Call to remind persons invited to a COI event one day prior. Inform the center leader of any change to the meal count.
- d. Load COI event participants into RZ/Leader Zone (LZ) as appropriate.
- e. REA expenses must be documented for reimbursement. Recruiter will use the local voucher module in the Defense Travel System (DTS) and upload a spreadsheet with individual expenses or list each expense individually in DTS.
- f. Keep the center leader informed on the status of COI.

## **Chapter 3**

### **Policy**

#### **3-1. Program Authority**

The policies in this regulation are established based on the provisions of Chapter 5, AR 601-2 (Army Promotional Recruiting Support Programs). Should any provision of this regulation conflict with AR 601-2, the Army regulation takes precedence.

#### **3-2. Command Oversight**

- a. USAREC will use MMS to track and monitor events to ensure purpose and costs meet the necessary criteria.
- b. Brigades will use MMS for all COI events regardless of cost.

#### **3-3. Procurement Authority and Local Servicing Contracting Officer**

Commanders will procure COI events according to policies and procedures established by the servicing contracting officer. Commanders will use the Government purchase card up to the maximum allowable level to facilitate vendor payment.

#### **3-4. Fund Utilization**

- a. Funds for COI events will be used to pay only for meals, refreshments, and nonalcoholic beverages. Cost limits must include gratuity and non-exempt tax to prevent underestimating the cost.
- b. US Code, Title 10, Subtitle A, Part II, Chapter 31, Section 520c is the authority for expenditure of appropriated funds on small meals for the purpose of military recruiting. Funds will be expended as follows:
  - (1) Persons who are objects of armed forces recruiting efforts.
  - (2) Persons whose assistance in recruiting efforts of the Army is determined to be influential.
  - (3) Members of the armed forces and Federal employees when attending recruiting functions according to an official requirement to do so.

#### **3-5. Spending Limits**

- a. Battalion commanders may approve events up to \$1,500 according to AR 601-2. The Commanding General (CG), USAREC establishes authority to grant exception to policy for events up to \$3,000 to brigade commanders.
- b. Events are limited to small meals within local, per meal per diem limits. Refer to [www.gsa.gov](http://www.gsa.gov) for current, per meal per diem limits for guidance on the maximum allowable cost for meals within the local area.
- c. A COI event that costs more than \$3,000.00 or involves Temporary Duty (TDY) travel must be approved by HQ, USAREC G7/9.
- d. Requests for service require completion of the Acquisition Management Oversight (AMO) process and also requires submission of a DA Form 3953 (Purchase Request and Commitment) for processing.
  - (1) Services include events that exceed the brigade approval threshold and/or include TDY. It also covers requests for services that fall below the \$2500 threshold for using the government purchase card (GPC).
  - (2) The AMO process must be completed prior to funds utilization for both service and supply acquisitions.
  - (3) Purchases over the GPC \$2500 threshold must be submitted no less than 120 days prior to date needed or the Mission and Installation Contracting Command (MICC) will not be able to complete the requested actions.

#### **3-6. Small and Disadvantaged Business**

USAREC will place a fair amount of its contracts with small and disadvantaged businesses. This policy conforms to the Federal Acquisition Regulation.

#### **3-7. Recruiter Expense Allowance**

Recruiters may use REA funds for mini-COI events with three or fewer COIs.

#### **3-8. Approved Functions and Purpose**

- a. COI events are business and professional functions. Recruiters and commanders conduct these events to promote Army recruiting operations. Invitations are limited to only persons who can influence the target market or enhance recruiter access to schools.
- b. Do not routinely invite spouses of COI. Since COI events are business or professional activities, spouses of COI are not normally invited to attend COI events solely because they are their spouses. There may be occasion when, in order to address an evening board of education dinner meeting where board member spouses are always present, it is deemed justifiable to host the spouses as well. UF 601-2.1 must state why a COI spouse was invited.
- c. The COI who attends one event should not be invited to attend subsequent events on the same topic in the same year.



- (1) This restriction does not preclude COI's attending as a guest speaker.
- (2) Whenever possible, commanders should include COI from the Grassroots Program into other COI events.
- (3) This restriction does not apply to participation in Grassroots COI working groups.
- d. Make every effort to schedule COI events with restaurants or other vendors that agree to only charge for the number of meals served.
  - (1) Payment is not authorized under this regulation for additional meals not listed on UF 601-2.2.
  - (2) In the event a vendor will not guarantee per meal purchase only and no-shows occur, exceptions may be granted by HQ USAREC. Requests for exceptions must justify restaurant selection and document what measures were taken to avoid no-shows.

### **3-9. Grassroots Outreach and Working Groups**

- a. The U.S. Army's Grassroots Outreach Program is designed to ensure the value of being a Soldier is well understood and positive attitudes toward Army service are fostered at the local level.
  - (1) A well-designed grassroots effort is a tool that can be used to identify, cultivate and equip credible COI to share the Army service story.
  - (2) The Grassroots Outreach Program consists of four components:
    - (a) Market Assessment
    - (b) Grassroots Working Groups
    - (c) COI Outreach
    - (d) Media Outreach
  - (3) Components of the model are important, in establishing Grassroots Working Groups.
  - (4) The Grassroots Working Group is key to maintaining the formal connection between the Army and the local community and provides the continuity between outgoing and incoming Army leadership. Members of the board help Recruiters positively connect within their communities and overcome obstacles.
- b. Grassroots Working Groups are informal organizations that operate without official advisory capacity. Informal Grassroots working groups operate under the authority of AR 360-1 (The Army Public Affairs Program), Chapter 8 and AR 601-2, Chapter 5. Activities are limited to:
  - (1) Connecting with COI to positively influence their perception, attitude and knowledge about the Army, and develop advocacy for the Army in local communities.
  - (2) Providing advice to Army recruiters on recruiting activities, and participation on informal Grassroots working groups (they do not provide formal advice as advisory committees or boards).
  - (3) Recruiting battalions may periodically schedule informal Grassroots working group meetings and may provide meeting rooms and administrative support.
- c. Prohibited Activities include:
  - (1) Engaging in fund raising activities.
  - (2) Sponsoring events for Soldiers, such as parties, meals, or entertainment, because such events are well beyond the purpose and role of the working groups.
  - (3) Sponsoring events to benefit Soldiers and families. Joint Ethics Regulations (JER) prohibit government employees from soliciting or accepting gifts from most outside sources. Consult brigade legal advisors as required.
  - (4) Organize as Non-Federal Entities (NFE) or charitable organizations under IRS code 501c(3). USAREC activities, Soldiers and Army civilians will not participate in their official capacities in organizing, directing, or managing NFE. Furthermore, USAREC activities, Soldiers and Army civilians will not endorse NFE or their activities. For information about the rules for dealing with NFE, Soldiers and Army civilians should consult their legal advisors.
- d. Battalions may use appropriated funds to pay for refreshments and non-alcoholic beverages in accordance with AR 601-2, Chapter 5 and UR 601-2, Management of Centers of Influence Events.

### **3-10. Frequency**

Recruiting company commanders should conduct one COI event per calendar quarter.

### **3-11. Military and Civilian Employees**

- a. Department of the Army (DA) military or civilian personnel required to participate in COI events may consume meals or refreshments provided as part of the event at no cost to the member.

- b. This is consistent with guidance contained in Chapter 5-2(h), AR 601-2.
- c. Total Army Involvement in Recruiting (TAIR) participants may be involved in COI events. Examples include a general officer scheduled to speak at a COI event and TAIR skill team demonstrators scheduled to perform at a COI event.
- d. If the presence of other than DA military or civilian personnel is deemed essential to the conduct of the COI event, the meal for the person will be provided at Government expense.

### **3-12. Prohibitions**

COI event funds will not be used for any of the following:

- a. Lavish or extravagant functions.
- b. Expense of hiring personnel.
- c. Purchase of alcoholic beverages.
- d. Rental of commercial conveyances for transportation of COI.
- e. Rental of facilities, equipment, or hiring of servicing personnel.
- f. Organizational anniversaries including company, battalion, and brigade level activation dates and organization days. Army birthday events are exempt from this prohibition.
- g. An event, facility, or activity where admission, seating, or other accommodations or facilities connected with the event or function are restricted as to race, color, religion, gender, or national origin.
- h. Purchase of tickets or admissions to sporting, recreational, or to other public activities
- i. Entertaining individual prospects and/or applicants who are not COI.
- j. Circumventing any restrictions imposed by any other directive.
- k. Any purpose for which use of appropriated funds is expressly prohibited.
- l. Incidental expenses that are payable from other sources. Examples include registration fees, materials, and costs to develop announcements and signs.
- m. Medical student luncheons. These events are primarily targeted toward prospects and are covered by centralized funding controlled by the Medical Recruiting Brigade and USAREC G7/9. Medical educator events are paid from direct advertising funds the same as normal COI events.

## **Chapter 4**

### **Educator Center of Influence Program**

- a. Commanders and local COI program managers will use Appendix D, COI Event Checklist, to plan events and manage their program.
- b. All COI events will be entered into the marketing management system. No cost or low cost events do not preclude entry into marketing management system.
- c. Ensure that no COI event exceeds a 3:1 ratio for meal authorization - 3 COIs for each Department of Defense (DOD) person present.
  - (1) Ratio computation will be based upon actual attendance, not upon the total number of persons invited to a particular event. Example: If 30 civilian COIs are invited and show up for a COI event, 10 DOD personnel would be eligible to have their meal purchased at government expense. If 25 civilian guests attend, 8 DOD personnel would be eligible to have their meal paid for with appropriate funds. The 2 remaining DOD personnel must either pay for the meal out of pocket or not attend the event.
  - (2) For the COI Program DOD is defined as a Soldier, Recruiter, GS or contract employee, Reservists, Reserve Officer Training Corps (ROTC), Junior Reserve Officer Training Corps (JROTC) cadre and retired military.

### **4-1. Objectives**

- a. Each battalion will participate in one funded tour to an Army installation for educators and other COI to improve their knowledge of Army education and training opportunities.
- b. Support the recruiting field force by improving recruiter access to high schools and postsecondary institutions.
- c. Improve the potential to produce grad I-IIIa and hi-grad accessions.
- d. Solicit the support from E/COIs to improve access to schools, obtain directory information, schedule the Armed Services Vocational Aptitude Battery Career Exploration Program, and refer potential prospects to the local Army recruiter.

## 4-2. Policy

a. E/COI tours are designed to be professionally enriching experiences for educators and key influencers. Participants will become informed supporters who can publicize and promote Army opportunities, advertising, and recruitment with students, graduates, and other E/COIs.

b. Focus tours on those places that need attention. The Army will not use tour resources in an arbitrary or random fashion. Tours are not junkets or rewards to E/COIs for cooperation with recruiters.

c. Commanders will select participants who are key influencers and decision makers. Key influencers among high school and college students are counselors and teachers who can testify as to the quality of Army educational benefits and technical training. Key policy influencers are superintendents, school board members, principals, and college administrators who can establish a policy to allow recruiters reasonable access to the campus, students, and directory information. College financial aid officers, admissions officers, and registrars can also support recruiters and influence students. A key COI is a mayor, police chief, city council member, clergyman, job service director, or community leader.

d. Do not select all friends of the Army, but some solid pro-Army participants will be helpful. Participants who are supportive of Army programs will be able to share their experiences with the other educators. However, when selecting participants the focus will be on E/COIs who are open-minded neutrals or undecided key influencers. It is not recommended to select more than one person per tour from a particular high school, college, or business.

e. Participant limitations.

(1) Authorized participants. Regular tours require no fewer than 14 participants and three escorts. When the number of participants falls below the required number, the battalion project officer will contact the brigade. The brigade commander will decide whether it is cost effective to proceed. An undersized tour will not proceed without written approval from the brigade commander. Consideration will be given to joining battalions together for a combined tour when below 14 participants. The maximum number of participants is 40, with four escorts. The intent is to keep all participants and escorts together on one bus. When the number of participants exceeds the maximum number, the brigade commander must give written approval.

(2) Authorized escorts. For an approved undersize battalion tour, the U.S. Army Recruiting Command (USAREC) funded escort to E/COI ratio will not exceed three escorts for up to 13 participants. For a regular tour, the ratio is four escorts for 14 to 40 participants.

(3) Husbands and wives will not participate on the same tour at Government expense. Similar restrictions apply to other family members. Consideration for exceptions is given to spouses or other family members who are legitimate COIs in their own right.

(4) An individual E/COI may participate in a tour no more than once every 3 years. It is not recommended to select any guest who has attended two or more tours in the past 10 years.

(5) The command will not invite Selected Reserve members, Junior Reserve Officers' Training Corps instructors, military entrance processing station personnel, and any other Federal Government employees.

(6) Requests with a written justification for an exception to policy (ETP) to allow these individuals to participate (see (3), (4), and (5) above) will be forwarded to the brigade for approval and will be handled on a case-by-case basis. The brigade commander must provide written approval for these individuals before sending a written invitation. The command should make these requests no less than 45 days prior to tour date.

(7) Students (no exceptions) will not be invited to participate on an E/COI tour.

(8) The command will treat any illness or injury which occurs during the Army-sponsored E/COI tour in accordance with AR 40-400, paragraph 3-46. (AR 40-400 should be referenced when processing invitational travel orders (ITOs) or processing via the Defense Travel System (DTS) for all E/COI tour invitees.)

(9) Ground transportation costs (bus or van) usually require a Government contract to conduct a tour on the installation. Bus drivers are not considered participants or escorts. They are contractors who provide a service, and the ground transportation contract will cover their expenses.

f. Geographic limitations. For tours outside brigade boundaries, a brigade commander's approval and lateral coordination with another brigade area of operation is needed. The following conditions must apply:

(1) The sponsoring battalion has received tentative approval for the tour from the host installation both for the desired timeframe and the number of participants.

(2) A tour of that installation is cost effective (within fiscal year (FY) budget restraints) and the expected results justify the use of this tour site compared to other installations.

g. Tours to the Military District of Washington (MDW) will be authorized only under special circumstances.

(1) Special tours to the MDW area, which include a visit to Headquarters, Department of the Army, may be authorized as an exception to the normal geographic limitations. Requests will be forwarded through the brigade to Headquarters, U.S. Army Recruiting Command (HQ USAREC), ATTN: RCME-ED, 1307 3rd Avenue, Fort Knox, KY 40121-2725, with proposed dates at least 120 days prior to the tour and require approval by the USAREC, Chief of Staff (CoS). Individuals invited to participate in such tours will be prominent individuals who are of key importance in determining policy within the school district or postsecondary institution.

(2) Tour plans should allow up to a half day at the Pentagon for a briefing by Headquarters, Department of the Army officials and tour of the premises. Participants will spend the balance of each tour day at nearby Army installations.

h. There is no authorization for tours to the U.S. Military Academy or to the Military Preparatory School. Persons who wish to tour those installations will be referred to the U.S. Military Academy.

i. Maximizing tour efficiency. The combining of undersize groups of two or more battalions to ensure a combined tour group does not fall below 20 E/COI participants is recommended and authorized. The brigade project officer will review each battalion's preliminary tour plan and will discuss with the battalions the combining of tours to efficiently use that host installation's resources. Also authorized: attaching participants from one battalion's tour to another battalion's tour to maximize tour participation.

j. Tour cancellations. Commands will issue invitations with the understanding that if the tour is canceled for any reason, such cancellation will be announced 48 hours prior to the departure date. To minimize tour cancellations that result when a participant drops out at the last minute, the nominating recruiter or recruiting center (RC) commander will contact the invitee 3 to 5 days prior to the departure date. In the event that a participant must cancel or might not show; the recruiter will immediately contact the project officer. The project officer will then seek a replacement to keep the tour group size large enough to proceed. When the host installation or brigade deems a tour group is too small to justify conducting the tour, the battalion project officer will promptly notify all participants of the tour's cancellation.

k. Media participants: Media representatives may accompany tours with the approval of the public affairs officer (PAO) of the installation on which the tour occurs and the brigade advertising and public affairs (APA) chief.

l. A well-planned tour itinerary will include installation briefings, lunch with Soldiers, Soldier panel, and hands-on activities (see table 1). Tours will be a multi-day event not less than 2 days, not exceed 5 days, including travel. A tour day usually consists of 8 hours with a lunch break. Project officers may also arrange for participants to voluntarily join in organized free-time activities. Such activities may include dinner or a tour of local historic sites.

<b>Table 1</b> <b>E/COI tour itinerary (recommended activities)—continued</b>	
5	Observe (infantry, armor, artillery) training exercises.
6	Attend graduation ceremonies (BT and/or AIT).
7	Lunch in military dining facility (interact with Soldiers).
8	Conduct a tour of the barracks.
9	Attend simulation exercise (hands-on).
10	Guided tour of military museum.
11	Attend K-9 demonstration.
12	Visit and/or attend briefing at the Army education center.
13	Conduct Soldier panel/Soldier education panel.
14	Observe confidence training and/or weapons training (hands-on activity).
15	Briefing and/or tour medical facilities (hospital).
16	Attend Army values briefing.
17	Visit post exchange.
18	Tour AIT schools (language, medical, etcetera).
19	Tour morale, welfare, and recreation facilities (child care, youth centers, etcetera).
20	Lunch at installation morale, welfare, and recreation club facilities. Example: Leaders Club, All Ranks Club.
21	Visit a noncommissioned officer academy.

**Table-1 E/COI Tour Itinerary**

### 4-3. Responsibilities

- a. Commanding General, USAREC, will exercise overall supervision of the USAREC E/COI Tour Program and will:
  - (1) Provide policy and general guidance.
  - (2) Disburse necessary funding support to brigade commanders.
  - (3) Delegate to brigade commanders the approval authority to approve requests for ETPs that pertain to participants, locations, and tour size.
  - (4) Delegate to the CoS and/or deputy commanding general the authority to approve tours to the MDW.
- b. Assistant Chief of Staff (ACS), G4/8, will:
  - (1) Coordinate current and subsequent FY funding requests and provide support through the regular process of the budget cycle.
  - (2) Provide funding allocation to brigades. Monitor status of brigade funds utilization. Ensure appropriate USAREC regulations include proper funding policies, procedures, limitations, and safeguards.
- c. ACS, G7/9, will:
  - (1) Serve as proponent for inquiries on the conduct of the tour program generated at brigade and battalion level.
  - (2) Receive and review initial and quarterly tour reports from brigades.
  - (3) Serve as proponent for the tour program.
  - (4) Serve as HQ USAREC point of contact with Army installation staff offices handling E/COI tours.
- d. Brigade commanders will:
  - (1) Exercise overall supervision of the brigade-sponsored tours.
  - (2) Monitor and control all tours to ensure maximum participation and most efficient use of resources.
  - (3) Appoint a brigade tour project officer, normally the brigade education services specialist, with responsibility and authority for management of the brigade's E/COI Tour Program. Further assign this person to serve as project officer when appropriate, for brigade-wide tours.
  - (4) Review each battalion's preliminary request for coming FY tours. Provide written notification to battalions on tour status (approval or disapproval) by 1 September. Avoid scheduling tours during the first quarter.
  - (5) Act as the approval authority for undersize (under 14 participants) and oversize (over 40 participants) battalion E/COI tours. When tours fall below 14 E/COI participants, contact the host installation and then determine if it is cost effective to proceed. Undersize and oversize battalion tours will not commence without the brigade commander's written approval.
  - (6) Act as approval authority for subsequent battalion tours.
  - (7) Act as the approving authority for ETPs that deal with participant limitations in paragraphs 5e (3), (4), (5), and (6).
- e. Brigade project officers will:
  - (1) Develop, publish, and disseminate local guidance for conducting battalion E/COI tours.
  - (2) Submit an initial USAREC Form 601-2.3 (E/COI Tour Program Report) (see fig 1) listing projected tours for next FY to HQ USAREC, ATTN: RCME-ED, by 1 July. This projection is to be approved by the brigade commander. Along with the initial report, forward any requests by battalions with endorsements and justifications for an ETP to tour the MDW in the coming FY. HQ USAREC, G7/9, Education Division, will provide the brigade project officer with a response to the ETP prior to the upcoming FY.
  - (3) Submit a quarterly USAREC Form 601-2.3 (see fig 2) to HQ USAREC, ATTN: RCME-ED, by the 15th of each month following the quarter. Include in the report any tour change based on rescheduling or add-on tours.
  - (4) Collect and review requests for battalion E/COI tours. Review requests to ensure battalions are meeting the intent of this regulation and using proper procedures. Review submitted documentation for E/COI tours and DA Form 3953 (Purchase Request and Commitment) and forward submitted documentation to the brigade budget office for further review and processing. Note: Contracting and AMO packet process is separate from the E/COI Tour process.
  - (5) Notify battalion project officer of the tour approvals. Monitor requests to ensure battalion commanders have screened each invitee list. Project officers will ascertain that only authorized participants are invited, and will evaluate each battalion's E/COI tour agenda to ensure it meets guidance.
  - (6) Control and monitor tour participants of combined battalion E/COI tour groups to maximize group size.
  - (7) Review, evaluate and maintain a copy of battalions' after action reports (AARs). Ensure battalions are following proper procedures in accordance with brigade guidance. Ensure an analysis of the AAR is uploaded in EMM for completed tours which will include the intent, best practices, return on investment (meet the intent), follow up activities, and recommendations to HQ USAREC, G7/9, along with lessons learned and best practices for publication. Keep a copy of battalions' AARs for the current FY and the two previous FYs on file at the brigade.

f. Battalion commanders will:

(1) Appoint a tour project officer (normally the battalion education services specialist) to plan, manage, coordinate, and accompany the tour as an escort. A checklist of important functions (tasks) to be completed by the project officer is at table 2.

Table 2: E/COI Tour Checklist

ACTION	TIME LINE
Call host installation PAO to determine the lead time needed to support a tour. Set up tentative tour dates. Get address and telephone number of host installation point of contact. Make a record of the conversation.	120-180 days
Send out official letter (see fig. 4) requesting host installation support to conduct a tour. Confirm tour dates and indicate the number of participants. Request specific activities be included in the itinerary.	90-120 days
<ul style="list-style-type: none"> <li>-Solicit E/COI tour nominees from company commanders. Provide commanders with tour information (that is, dates, location, tentative itinerary, transportation arrangements, and cost involved (per diem). Indicate number of tour seats allotted per company and suspense date for tour nominees.</li> <li>-Contact two to three hotels close to the host installation to get a cost analysis and room availability. Inquire as to services provided (shuttle, hospitality room, restaurants etc.) and follow current contracting guidelines if contracting lodging.</li> <li>-Check on the cost of airfare, bus transportation, and rental vehicles and follow current contracting guidelines if contracting transportation.</li> </ul>	75-90 days
<ul style="list-style-type: none"> <li>- Submit proper documentation DA Form 3953 to brigade project officer for hotel contract or select hotel and book rooms if not contracting. Request hotel brochures and inquire about tax exempt and procedures.</li> <li>-Get information on host installation and local area (check with local chamber of commerce).</li> <li>-Finalize arrangements (Cost and service) for ground transportation (commercial bus or van).</li> </ul>	60-75 days
<ul style="list-style-type: none"> <li>-Obtain tour nominations from company and RC commanders. Assess tour nominations and select participants. Conduct follow-up with the participants selected to ensure that they are still interested in going on a tour. Inform them they will receive an official invitation from the Battalion Commander.</li> <li>-Send out formal letter of invitation to each E/COI (see fig. 5)</li> <li>-Send a list of the participants selected to the company commander, RC commander, and nominating recruiter</li> <li>-Ensure the RC commander and nominating recruiter follow-up with invitees. Have they received their invitation? Are they still planning to attend?</li> <li>-Arrange for air travel (number of projected participants)</li> </ul>	45-60 days
<ul style="list-style-type: none"> <li>-Firm up a list of participants. For invitees who accept, obtain their social security numbers and home addresses for use in preparing ITOs and entering information into DTS.</li> <li>-Send out information packets. Include information on appropriate dress, flight times, hotel, per diem, and ground transportation.</li> <li>-Contact host installation point of contact to check on the tour status and review the proposed itinerary.</li> </ul>	30-45 days
<ul style="list-style-type: none"> <li>-Coordinate with the resource management specialist and request ITOs for each tour participant. Provide a list of participants.</li> <li>-Ensure the nominating recruiter or RC Commander contacts his/her E/COIs and arranges a military escort to and from airport.</li> <li>-Identify battalion escorts for tours. Tours should include the project officer and battalion commander.</li> <li>-The Battalion Commander will select additional escorts.</li> <li>-Contact hotel and finalize times. Send the hotel a point of contact a guest list of tour participants.</li> <li>-Contact E/COI participants to ensure recruiters have arranged transportation to and from the departure location (airport).</li> </ul>	21-30 days

Table-2 E/COI Tour Checklist



Table 2: E/COI Tour Cklist(Cont)

ACTION	TIME LINE
-Send a list of E/COI participants to the host installation point of contact. -Provide a list of E/COI participants to the travel agent to confirm and secure airline reservations	14-21 days
-Assemble information packets to be handed out prior to departure. Include in the packet: Travel orders, travel voucher, pen, notepad, pay chart, recruiting publicity items, and USAREC Form 601-2.4. Remind RC commanders and nominating recruiters to contact their E/COIs to confirm tour participation. Make any necessary adjustments to hotel and flight arrangements.	7-14 days
-Obtain final E/COI tour itinerary from host installation. Place itinerary in information packet. Ensure recruiters have followed up with E/COIs. Act on tour cancellations (invite an E/COI from the alternate list). -Report undersized tour to brigade. Undersized tours may proceed only with Brigade commander's approval. -Ensure all E/COIs are contacted prior to departure date, either by the recruiter or telephonically by the project officer. Need to eliminate no-shows up front so changes can be made. -Finalize tour. Make any necessary changes and adjustments.	1-7 days
FOLLOW UP ACTIONS	
- Forward copy of USAREC Form 601-2.4 to responsible RC commander or recruiter. -Complete E/COI travel vouchers in DTS for final reimbursement.	1-3 days
-Send a Thank You and follow-up letter to all E/COI tour attendees within 2 weeks of completion of the tour.	1-15 days
- Complete AAR and upload in EMM and notify brigade.	15-30 days

Table 2 E/COI tour checklist-continued

- (2) Submit a request for approval of the E/COI tour (see fig 3) to the brigade for approval.
- (3) Establish procedures for using funds allocated from the brigade to ensure invitees and participants meet program objectives.
- (4) Evaluate the company tour nominations to ensure they meet the objectives and determine which nominees offer the best potential return on investment. The recommendation is that multiple guests from one school, college, or business not be invited on the same tour.
- (5) Request in writing, to the brigade commander, justification for any ETP that deals with participants, location and tour size. Any exceptions regarding tour participants require written approval from the brigade commander prior to sending out E/COI tour invitations.

(6) Accompany the battalion tour as an escort.

(7) Send a thank you and follow-up letter to all E/COI tour attendees within 2 weeks of completion of the tour.

g. Battalion tour project officers will:

(1) Coordinate development of the coming FY's preliminary tour plan. Request support from an Army installation to host a tour (see fig 4). Host installations normally require a written request at least 120 days in advance.

(2) Be responsible for timely accomplishment of the planning, administrative, logistical, and follow-up requirements for the battalion tour (see table 2). For special considerations such as military air transportation, it is important to ensure this timeframe is adhered to.

(3) Submit necessary documentation for E/COI tour (DA Form 3953) to the brigade project officer for review and approval.

(4) BN project officer will follow current contracting guidelines if contracting transportation or lodging accommodations for tour attendees.

(5) Evaluate and prioritize all tour seat nominations submitted by company commanders.

(6) Review previous E/COI tour AARs prior to planning current year tours. Ensure that planning precautions are taken to avoid stumbling blocks; that the targeted host installation has tentatively accepted the tour dates and that commercial bus transportation at the tour site is available. Make these arrangements before sending written invitations.

(7) Forward the names and media affiliation of nominees who are members of the media to the battalion APA chief. The brigade and host installation must clear these nominees before sending written invitations.

(8) Verify the names, titles, and addresses of nominees for accuracy with the sponsoring recruiter.

(9) Send out letters of invitation (see fig 5). Once they have been mailed, check with the recruiter to confirm that the nominee has received the invitation. For invitees that accept, obtain the necessary information for use in preparing their invitational travel in DTS. Ensure a follow-up call is made to confirm participation. In accordance with paragraph 5e(6), written approval from the brigade commander is required prior to sending invitations to those guests requiring an ETP.

(10) Coordinate with the resource management specialist to enter tour participant information into DTS. The resource management specialist will track battalion expenditures. Troubleshoot any problems that occur and ensure that required ETPs are in place before the tour proceeds.

(11) While on the tour, assist participants in completing their reimbursement request forms. Arrange for a specific time and place for doing this at the end of the tour.

(12) Review all E/COI travel voucher information and load it into DTS for reimbursement. Tour participants may not request advance per diem payments.

(13) Ensure each participant completes USAREC Form 601-2.4 (see fig 6) and attach copies of the completed forms to the AAR. Also, forward copies to each participant's respective RC for follow up.

(14) Complete a tour AAR (see fig 7) and upload in EMM. Attach a copy of each participant's tour evaluation. Suspense to Brigade is 15 days following completion of the tour.

(15) Request support and approval from the brigade for additional tours (see fig 8). Requests should be made 120 days prior to tour date and require brigade approval to proceed.

(16) The tour project officer may conduct a reconnaissance tour to the host installation using battalion mission funds to ensure that the battalion tour runs smoothly.

h. Battalion APA chiefs will:

(1) Request prior approval of the brigade and host installation PAO when a member of the media is nominated to accompany a tour. The battalion project officer will provide the media person's name and affiliation. Provide the battalion project officer with the decision on whether media can participate.

(2) Be responsible for planning public affairs coverage of the tour, developing articles of special interest, preparation of news releases (with photos), and distribution to hometown newspapers for each participant if desired.

(3) Coordinate with the installation being toured for appropriate photography service, when available. Otherwise, arrange for the project officer or an escort to take one or two group pictures. Provide one group photo to each tour participant as a souvenir, if desired, by the commander. The local recruiter should make delivery of the photo during a school visit.

i. Company commanders will:

(1) Evaluate and prioritize all needs for the tour participant's seats. Confirm the justification for each. Forward a recommended nominee list for the battalion tour to the battalion project officer within the required suspense.

(2) Ensure RC commanders and recruiters provide nominations for tours, with appropriate information on how their nominee's participation would have a positive impact on recruiting.

(3) Ensure that, after the tour, recruiter follow-up takes place to derive benefit from each attendee's participation. Relay results to the battalion tour project officer as appropriate to justify the continuance of the program. If some of the results surface later, forward a supplemental note to the project officer referencing the tour.



j. RC commanders will:

(1) Forward nominee information to the company commander. Ensure that the custodian of the school zone has evaluated the market and has identified key E/COIs whose participation may eliminate some barriers to recruiting.

(2) Allow the recruiter enough time, once the command selects a nominee for a tour and the project officer requests the assistance of the sponsoring recruiter, to encourage the E/COI's acceptance and to keep the E/COI who accepts motivated so he or she will not cancel.

(3) Ensure proper recruiter follow-up takes place to derive benefit from each attendee's participation. Ensure the local recruiter receives a copy of USAREC Form 601-2.4 which lists the services and information requested by the E/COI participants.

k. Recruiters will:

(1) Assess their school market and review assigned school zones to identify key influencers and policymakers whose participation on a tour may eliminate some barriers and would have a positive impact on recruiting.

(2) Submit their nominations (name, title, and address) through the RC commander to the company commander. Provide accurate address information for written invitations. If a member of the news media is being considered as a nominee for the tour, also provide the news affiliation. The brigade APA and host installation PAO must preapprove news media nominations before sending any invitations.

(3) Avoid promising tour invitations to E/COIs until the tour project officer informs recruiters that the E/COI will be invited.

(4) Follow up with the nominee to ensure receipt of the tour invitation. Recruiters will call invitees 3 to 5 days prior to the tour to remind them of departure arrangements, answer questions, and obtain invitee reassurances that they are participating on the tour. Tour cancellations will be reported immediately to the battalion project officer.

(5) Escort and transport tour participants to and from the departure point.

(6) Immediately following the tour, make arrangements with the E/COI participants to achieve objectives. Follow up on any requests for services or information as indicated on their completed USAREC Forms 601-2.4. Inform the RC commander of the results of follow-up visits.

#### **4-4. Types of E/COI tours**

a. Regular tour. Planned and conducted by one battalion. A regular tour will have at least 14 E/COI participants. All organizational and functional responsibilities are tasked to the battalion project officer.

b. Combined tour. Includes participants from two or more battalions. Each participating battalion will have its own project officer for the tour. The project officer will participate in the tour as an escort. The brigade will designate one battalion as the lead.

(1) The lead battalion plans, organizes, and controls the tour and assumes command responsibility for all participants.

(2) The lead battalion project officer will complete the Army command (ACOM) support request (see fig 4) and coordinate with the host installation.

(3) When planning and conducting a combined tour, each battalion's project officer will be responsible for his/her own participants' travel arrangements and for submitting their travel vouchers. Also, each battalion project officer will obtain a USAREC Form 601-2.4 from their participants then complete an AAR and upload in EMM (see fig 7) to the brigade.

(4) A combined tour requires at least 20 E/COI participants. Combining undersized groups from two or more battalions is encouraged. However, when two or more battalions decide to run a combined tour, a larger number of participants will maximize host installation resources.

<b>E/COI Tour Program Report</b> (For use of this form see USAREC Reg 601-2)											
Recruiting Brigade: <input style="width: 80%;" type="text"/>					Project Officer: <input style="width: 80%;" type="text"/>					FY: <input style="width: 10%;" type="text"/>	
Type of Report:    Initial <input type="checkbox"/> 1st Qtr <input type="checkbox"/> 2d Qtr <input type="checkbox"/> 3d Qtr <input type="checkbox"/> 4th Qtr <input type="checkbox"/>											
Recruiting Battalion	Type of Tour	Tour Status	Dates of Tour	Army Installation	Number of E/COIs	Number of Escorts	AAR Complete	Overall Rating	Total No. Rctr Svcs Requested	Total No. Info Requested	Comments

USAREC Form 601-2.3, 25 June 2015                      (THIS FORM REPLACES USAREC FORM 1220)                      V1.00

Figure 1. Sample of a blank USAREC Form 601-2.3 for the initial report

<b>E/COI Tour Program Report</b> (For use of this form see USAREC Reg 601-2)											
Recruiting Brigade: <b>3rd Rctg Bde</b>					Project Officer: <b>Mr. Donald Smith</b>					FY: <b>2015</b>	
Type of Report:    Initial <input type="checkbox"/> 1st Qtr <input type="checkbox"/> 2d Qtr <input checked="" type="checkbox"/> 3d Qtr <input type="checkbox"/> 4th Qtr <input type="checkbox"/>											
Recruiting Battalion	Type of Tour	Tour Status	Dates of Tour	Army Installation	Number of E/COIs	Number of Escorts	AAR Complete	Overall Rating	Total No. Rctr Svcs Requested	Total No. Info Requested	Comments
Chicago	Regular	Conducted	18-21 Nov 14	Ft. Campbell, KY	17	3	Yes	Excellent	48	61	
Cleveland	Combined	Projected	1-3 May 15	Ft. Knox, KY	10	2					Combined tour with Columbus Battalion
Columbus	Combined	Projected	1-3 May 15	Ft. Knox, KY	15	2					Lead Battalion-Combined tour with Cleveland Battalion
Great Lakes	Regular	Conducted	27-31 Mar 15	Ft. Sill, OK	27	3	No				Just conducted tour/waiting AAR
Indianapolis	Regular	Conducted	11-15 Nov 15	Ft. Rucker, AL	23	3	Yes	Excellent	64	83	AAR Complete, Great tour!
Milwaukee	Regular	Projected	22-24 Jun 15	Ft. Benning, GA	20	2					Cancelled March tour.
Minneapolis	Regular	Projected	17-21 May 15	Ft. Jackson, SC	30	3					
Nashville	Regular	Projected	14-17 Jul 15	Ft. Knox, KY	25	3					

USAREC Form 601-2.3, 25 June 2015

(THIS FORM REPLACES USAREC FORM 1220)

V1.00

Figure 2. Sample of a completed USAREC Form 601-2.3 for quarterly report

---

(Letterhead)

SUBJECT: *(Battalion)* E/COI Tour Plan for FY

1. Request approval of the preliminary E/COI tour plan at enclosure 1 *(include the host installation, tour dates, number of tour participants and escorts, and estimated cost)*. All requested tours outside of the brigade's boundaries require additional justification.
2. Justification for requested out-of-brigade boundary tours is also included at enclosure 2. Include information such as cost comparison, tour dates availability and/or non-availability, reasons closer alternative sites are inappropriate, special nature of the tour sites (for example, BT, AIT), and any other reason to justify out-of-boundary tour.

2 Encls

Battalion Commander

**Figure 3. Battalion request for E/COI tour approval**

---

(Letterhead)

SUBJECT: ACOM Support Request - E/COI Tour *(Date and Location)*

1. This confirms initial telephonic coordination between *(tour project officer)*, *(name of battalion)*, and *(post point of contact)*, on *(date of telephone conversation)*.
2. Request support of a tour to your installation which will include *(projected number of participants and escorts)* from the *(name of battalion)* Recruiting Battalion. The group will arrive at your installation *(projected date and time)*. The senior military member on the tour will be *(rank with first and last name)*. *(Note any special requests agreed upon with the installation point of contact.)*
3. Request the key items on the enclosed list be included in the tour itinerary.
4. Point of contact is *(project officer's name and telephone number)*.

FOR THE COMMANDER:

Encl

(Signature Block)

**Figure 4. ACOM support request for E/COI tour**

---

---

(Letterhead)

Dear (E/COI):

On behalf of the U.S. Army Recruiting Command, I would like to extend an invitation for you to visit (*location and dates*). We have planned an Educator/Centers of Influence Tour of (*installation*) activities to include briefing and discussions of current and future Army programs. You will have the opportunity to observe (*basic training, advanced individual training*) and visit with young Soldiers. The education and training opportunities available to students in America's Army cannot be overlooked. We firmly believe that the Army affords all high school graduates, both male and female, with a very favorable alternative to civilian employment. Therefore, we are extending this invitation to selected high school, college, and community officials to tour the (*location*) Training Center to experience and gain firsthand knowledge of the opportunities afforded our Soldiers.

The U.S. Army Recruiting Command will pay the expenses incurred by participants on this tour. Payment will be through reimbursement of funds spent by each individual for hotel rooms, meals, and other authorized expenses. Travel arrangements have been made through (*airline*) and tickets will be furnished to each participant, at no cost, at the time of departure from the airport. The tour schedule will be:

- a. (*Date leaving*): (*Departure time, airport, airline, flight number, and arrival time*).
- b. (*Date returning*): (*Departure time, airport, airline, flight number, and arrival time*).
- c. While in (*location*), tour guests will be staying at (*hotel, address, and telephone number*).

My representative, (*name of project officer*), will be calling your office to provide a more detailed itinerary, answer any questions you might have, and accept your reservation should you be able to join us. The Army is looking forward to the opportunity to have you travel with us on this tour and hopes you will find it educational and beneficial to the students and youth you serve.

Sincerely,

Battalion Commander

**Figure 5. Letter of invitation to E/COI**

---

<b>E/COI TOUR EVALUATION</b> <small>(For use of this form see USAREC Reg 601-2)</small>	
Participant Information	Tour Information
Name: <span style="background-color: #e0e0ff; padding: 2px 5px;">Stanley Shokonis</span>	Battalion: <span style="background-color: #e0e0ff; padding: 2px 5px;">Harrisburg Bn</span>
Position: <span style="background-color: #e0e0ff; padding: 2px 5px;">Guidance Counselor</span>	Tour Installation: <span style="background-color: #e0e0ff; padding: 2px 5px;">Ft. Benning, GA</span>
School or Organization: <span style="background-color: #e0e0ff; padding: 2px 5px;">Pittson Area High School</span>	Tour Dates: <span style="background-color: #e0e0ff; padding: 2px 5px;">2-4 Apr 15</span>
Telephone Number: <span style="background-color: #e0e0ff; padding: 2px 5px;">(570) 555-1234</span>	Tour Project Officer: <span style="background-color: #e0e0ff; padding: 2px 5px;">Eileen Bailey, ESS</span>
E-mail: <span style="background-color: #e0e0ff; padding: 2px 5px;">sshokonis@pahs.pa.edu</span>	E-mail: <span style="background-color: #e0e0ff; padding: 2px 5px;">eileen.bailey.civ@mail.mil</span>
<p>Thank you for participating on this year's Educator/Centers of Influence Tour to an Army installation. We hope that the knowledge and information you received about America's Army will be of value to you when advising young men and women on career options and opportunities. In order to evaluate this tour and help us plan more effectively for future tours, we request that you answer the following questions:</p>	
<p>1. Have you had prior experience with or exposure to the Army? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No            If so, what type?</p> <div style="background-color: #e0e0ff; height: 50px; margin-top: 5px;"></div>	
<p>2. Prior to this tour I would have rated my knowledge of Army training and educational programs as:</p> <p style="text-align: center;"> <input type="checkbox"/> Excellent      <input type="checkbox"/> Good      <input checked="" type="checkbox"/> Fair      <input type="checkbox"/> Poor         </p>	
<p>3. Have your perceptions of the Army changed as a result of this tour?</p> <p style="text-align: center;"> <input checked="" type="checkbox"/> More Favorable      <input type="checkbox"/> Less Favorable      <input type="checkbox"/> Same         </p>	
<p>4. What was the most informative and/or interesting section or part of the tour?</p> <div style="background-color: #e0e0ff; padding: 5px; margin-top: 5px;">           Confidence obstacle course            Meeting and talking with Soldiers at lunch.         </div>	
<p>5. What was the least informative and/or interesting section or part of the tour?</p> <div style="background-color: #e0e0ff; padding: 5px; margin-top: 5px;">           Classroom briefing            First day too long.         </div>	
<p>6. The overall rating of this educator/centers of influence tour is:</p> <p style="text-align: center;"> <input checked="" type="checkbox"/> Excellent      <input type="checkbox"/> Good      <input type="checkbox"/> Fair      <input type="checkbox"/> Poor         </p>	

Figure 6. Sample of a completed USAREC Form 601-2.4

7. Please check each box of the services and information you are requesting.

a. How can the Army help you?

☐ Recruiter presentations to my classes/school on Army resources and/or opportunities

☒ Host a career day or job fair booth at my school

☐ Provide an Army literature rack in the career center

☒ Discuss Army careers with students/faculty

b. How can you help the Army and your students?

☐ Refer interested youths to the local Army recruiter

☒ Encourage students to use March2Success ([www.march2success.com](http://www.march2success.com))

☒ Encourage your school to use the Armed Services Vocational Aptitude Battery Career Exploration Program (ASVAB CEP)

☐ Assist with the release of student directory information in accordance with the No Child Left Behind Act (NCLB)

☐ Nominate educators and key influencers for the next Army Educator Tour

c. Please provide more information on:

<input checked="" type="checkbox"/> Montgomery GI Bill and Post 9/11 GI Bill	<input type="checkbox"/> Concurrent Admissions Program (ConAP)
<input type="checkbox"/> Loan Repayment Program	<input checked="" type="checkbox"/> Cash Bonuses
<input type="checkbox"/> In-Service Education Programs (Tuition Assistance)	<input type="checkbox"/> March2Success (M2S)
<input type="checkbox"/> 2-Year and 3-Year Enlistment Options	<input type="checkbox"/> Educator/COI Tour
<input checked="" type="checkbox"/> Values Training	<input checked="" type="checkbox"/> ASVAB/CEP
<input type="checkbox"/> Scholar/Athlete Program	<input checked="" type="checkbox"/> JROTC/ROTC
<input type="checkbox"/> GoArmyEd	
<input checked="" type="checkbox"/> U.S. Army Military Academy at West Point	
<input type="checkbox"/> Army Civilian Acquired Skills Program	

d. Other comments:

Figure 6a. Sample of a completed USAREC Form 601-2.4 (Page 2)

SUBJECT: E/COI Tour After Action Report

1. An Educator/Centers of Influence (E/COI) tour was conducted to *(Army installation, tour dates, and number of participants and escorts)*. See a list of participants and their school or community affiliation at enclosure 1. *(State the specific objective sought and achieved for each E/COI.)*
2. The host installation provided adequate support *(if significantly inadequate, explain)*. The installation's tour itinerary is at enclosure 2.
3. Overall the participants rated the tour as (see USAREC Form 601-2.4, item 6).
4. The primary purpose of the tour was to create favorable awareness of Army options and opportunities. The secondary purpose was to request support from each E/COI participant. There were a total of \_\_\_\_ requests for recruiter services and a total of \_\_\_\_ requests for information (see USAREC Form 601-2.4, item 7). The evaluation forms containing this information were forwarded to the responsible recruiters for immediate follow up.
5. List the number by category for each request for recruiter service.
6. List the number by category for each request for information.
7. Problem areas *(indicate whether resolved or still needs to be addressed)*.
8. Recommendations.

Encls

Battalion Commander

---

Figure 7. Sample E/COI tour AAR

---



---

(Letterhead)

SUBJECT: Request for Approval and Funding for an Additional E/COI Tour in FY\_\_

1. Request for approval of an E/COI tour to *(location)* on *(dates)*.
2. Justification required. For E/COI tours outside of the brigade boundaries include cost analysis (cost per person) and targeted objectives.
3. Tour specifics:
  - a. Tour dates including travel days.
  - b. Number of tour participants and escorts. If available, enclose a roster (name, title, and school or organization) of the invitees and benefits sought from each.
  - c. The proposed itinerary is enclosed.
  - d. The estimated cost (travel, per diem, bus, etcetera).
  - e. The battalion will send *(insert titles of battalion personnel assigned to participate)* to supervise the tour.

FOR THE COMMANDER:

Encls

NOTE: Use this request for additional E/COI tours during the FY.

---

**Figure 8. E/COI additional tour request and approval**

---

## **Chapter 5 Procedures**

- a. Commanders and local COI program managers will use Appendix D, COI Event Checklist, to plan events and manage their program.
- b. All COI events will be entered into the EMM.
  - (1) No cost or low cost events do not preclude entry into EMM.
  - (2) Brigades and battalions will follow procedures established in the USAREC EMM Standard Operating Procedures (SOP) for entering and tracking COI events.
- c. Ensure that no COI event exceeds a 3:1 ratio for meal authorization - 3 COIs for each Department of Defense (DOD) person present as stated Chapter 6, paragraph 2 (c), AR 601-2.
  - (1) Ratio computation will be based upon actual attendance, not upon the total number of persons invited to a particular event. Example: If 30 civilian COIs are invited and show up for a COI event, 10 DOD personnel would be eligible to have their meal purchased at government expense. If 25 civilian guests attend, 8 DOD personnel would be eligible to have their meal paid for with appropriate funds. The 2 remaining DOD personnel must either pay for the meal out of pocket or not attend the event.
  - (2) For the COI Program DOD is defined as a Soldier, Recruiter, GS or contract employee, Reservists, Reserve Officer Training Corps (ROTC), Junior Reserve Officer Training Corps (JROTC) cadre and retired military.

## **Chapter 6 After Action Reports**

- a. After action reports (AAR). The recruiter, center leader, or company commander will complete UF 601-2.2 for each COI event. (Appendix C). Reports will be dispatched as follows:
  - (1) By the company commander to the battalion commander not later than the close of business on the third business day following the event or function.
  - (2) By the battalion commander to the brigade commander not later than the close of business on the fifth business day following receipt of UF 601-2.2 from the company commander.
- b. Battalion program managers will consolidate COI event AAR (UF 601-2.2) submitted by their company commanders and post an electronic copy in the marketing management system. Brigades are required to submit post-event data for events regardless of the cost no later than 20 days after event execution.
- c. The AAR prescribed in the marketing management system is the USAREC standard for capturing event return on investment. Only the owner of the event or system administrator will prepare and upload the AAR.

## **Appendix A References**

### **Section I Required Publications**

#### **AR 601-2**

Army Promotional Recruiting Support Programs

#### **AR 40-400**

Patient Administration. (Cited in para 4-2 e.(8).)

### **Section II Related Publications**

#### **US Code, Title 10, Subtitle A, Part II, Chapter 31, Section 520c**

Recruiting Functions: Provision of meals and refreshments

#### **AR 360-1**

The Army Public Affairs Program.

#### **AR 601-2**

Army Promotional Recruiting Support Programs.

#### **JTR, Vol 2**

Department of Defense Civilian Personnel.

#### **TRADOC Reg 37-2**

Temporary Duty Travel Policies and Procedures.

### **Section III Prescribed Forms**

#### **USAREC Form 601-2.1**

COI Event Request. (Prescribed in paras 2-3a.(3), 2-4a.(4), 3-8b., Appendix B, C-2c., D-2a.(1), D-2a.(4), D-2b., D-2c.(3), D-2d.(1), D-3b.(1), and D-3c.)

#### **USAREC Form 601-2.2**

COI Event After action Report. (Prescribed in para 2-3a.(3), 2-3f., 2-4a.(5), 2-5f., 3-8d.(1), 6a., 6a.(2), and 6b.)

#### **USAREC Form 601-2.3**

E/COI Tour Program Report. (Prescribed in paras 4-3e.(2), , 4-3e.(3), and E-4f(4).)

#### **USAREC Form 601-2.4**

E/COI Tour Evaluation. (Prescribed in paras 4-3f.(13), 4-3j.(3), 4-3K.(6), 4-4b.(3), figure 7, and table 2.)

## **Section IV Referenced Forms**

### **DA Form 3953**

Purchase Request and Commitment.

### **SF 1164**

Claim for Reimbursement for Expenditures on Official Business.

### **DD Form 1155**

Order for Supplies and Services.

## **Appendix B. Instructions for Completion of USAREC Form 601-2.1**

UF 601-2.1 will be used to request COI events and to record recommendations and approvals or disapprovals. Fig B-1 is a sample of a completed form.

**a.** The commander who requests an event will complete blocks 1 through 13. Block 10 will contain the purpose of the event, scheduled activities, and presentation topics. Examples are as follows:

**b.** Faculty lunch at high school. Commander or recruiter will present a 20-minute discussion of the Armed Services Vocational Aptitude Battery (ASVAB). A question and answer period will follow. Goal is to get agreement to offer the ASVAB to students and for teachers to encourage students to participate.

**c.** Major city job service directors' conference luncheon in hotel dining room. Discuss Army opportunities for high school graduates (35 min). Goal is to get counselors to refer job seekers to Army recruiters.

**d.** Battalion commander will evaluate the request. The commander or designee completes blocks 14 through 16. The battalion budget and accounting technician should review the request to ensure opportunities are not missed for state and community tax exemption. For requests which require brigade commander action, the brigade commander or designee will complete blocks 17 through 19. If cost of event exceeds spending limits, these blocks will be completed after HQ USAREC acts on the request.

<b>COI Event Request</b> (For use of this form see USAREC Reg 601-2)																	
<b>1. To:</b> Commander Columbia Rctg Bn 1835 Assembly St Rm 733 Columbia, SC 29201-2446	<b>2. From:</b> CDR, Columbia Rctg Co 1835 Assembly St Rm S26 Columbia, SC 29201-2446	<b>3. Date:</b>  <div style="border: 1px solid black; padding: 2px; text-align: center;">15 June 2015</div>															
<b>4. Proposed date, time, and location:</b> 15 June 2015																	
<b>5. Name and address of proposed vendor:</b>  Palmetto Inn 1224 Richland Ave Aiken, SC		<b>Proposed menu:</b>  Virginia baked ham or turkey and dressing, salad with dressing, sweet potatoes, vegetable, rolls, dessert, coffee, tea or soda.															
<b>6. Sponsor RS, Rctg Co, or HCRT:</b>  Columbia Rctg Co	<b>7. Expected Attendance:</b> <table border="1" style="float: right; border-collapse: collapse;"> <tr><td></td><td style="text-align: center;">32</td></tr> <tr><td>Military/DOD hosts</td><td style="text-align: center;">6</td></tr> <tr><td>COI</td><td style="text-align: center;">25</td></tr> <tr><td>TAIR Assets</td><td style="text-align: center;">1</td></tr> </table>			32	Military/DOD hosts	6	COI	25	TAIR Assets	1	<b>8. Cost:</b> <table border="1" style="float: right; border-collapse: collapse;"> <tr> <td>Per Person</td> <td style="text-align: center;">\$26.00</td> </tr> <tr> <td>Attendance</td> <td style="text-align: center;">32</td> </tr> <tr> <td><b>Total</b></td> <td style="text-align: center;"><b>\$832.00</b></td> </tr> </table>	Per Person	\$26.00	Attendance	32	<b>Total</b>	<b>\$832.00</b>
	32																
Military/DOD hosts	6																
COI	25																
TAIR Assets	1																
Per Person	\$26.00																
Attendance	32																
<b>Total</b>	<b>\$832.00</b>																
<b>9. Area schools or counties involved:</b> Aiken HS, South Aiken HS, Strom Thurmond HS, Aiken Technical College, USC-Aiken, Orangeburg HS, North august HS, Wagner-Salley HS, Barnwell HS.																	
<b>10. Goals, scheduled activities, and/or information to be presented:</b> 1130 Lunch served. 1215 MG Jordan speaks on opportunities for today's youth. 1230 CPT Houston speaks on the ASVAB Career Exploration Program.																	
<b>11. Remarks:</b> Request approval to invite Mrs. Irma Jones, wife of Mr. Roy Jones. Mr. Jones is a counselor at N. Augusta, and Mrs. Jones is a professor at USC-Aiken.																	
<b>12. Type requester's name and grade:</b> Thomas D. Houston, III, CPT		<b>13. Requester's Signature:</b> <div style="border: 1px dashed black; padding: 2px; text-align: center;">[Signature]</div>															
<b>14. Rctg Bn or AMEDD Det commander action:</b> <div style="display: flex; justify-content: space-between;"> <span><input type="checkbox"/> Approved    <input type="checkbox"/> Disapproved</span> <span>Date: _____</span> <span>Rctg Bn or AMEDD Det Control Number _____</span> </div>																	
<b>15. Type name and grade:</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		<b>16. Signature:</b> <div style="border: 1px solid black; padding: 2px; text-align: center;">[Signature]</div>															
<b>17. Rctg Bde commander action:</b> <div style="display: flex; justify-content: space-between;"> <span><input type="checkbox"/> Approved    <input type="checkbox"/> Disapproved</span> <span>Date: _____</span> <span>Rctg Bde Control Number _____</span> </div>																	
<b>18. Typed name and grade:</b> <div style="border: 1px solid black; height: 20px; width: 100%;"></div>		<b>19. Signature:</b> <div style="border: 1px solid black; padding: 2px; text-align: center;">[Signature]</div>															

USAREC Form 601-2.1, 25 June 15

(THIS FORM REPLACES USAREC FORM 544)

V1.00

Figure B-1 Sample of a completed USAREC Form 601-2.1 (Old UF 544)

## **Appendix C.**

### **Instructions for Completion of USAREC Form 601-2.2**

#### **C-1. Section I**

- a. The project officer sponsoring each COI event will complete an after-action report concerning the event using UF 601-2.2 (see fig C-1). The report will be submitted to the battalion commander, ATTN: COI Program Manager.
- b. The AAR will contain the following information:
  - (1) Administrative information, such as location, costs, and attendance.
  - (2) Beneficial results, such as the number of requests for recruiter services and pledges of support.
  - (3) Feedback from guests, if significant.
  - (4) Problems or opportunities, if significant.
  - (5) Recommendations, if significant.
  - (6) Leads generated and source.

#### **C-2. Section II**

- a. Enter name and title or position of military and/or DOD civilians attending or participating in the event, such as, CPT Houston, company commander; SFC Maddox, Columbia recruiting center; David Gearheart, battalion ESS; Mrs. Mary Maddox, recruiter wife (hostess); MG Jordan, GOSP speaker; SFC Irving, cinema van NCOIC. Place code "H" next to each name.
- b. Enter each COI name and title. Indicate name and position or title sufficient to provide audit trail. For example: Bill Barker, Aiken HS; Ron Willis, State Employment Office; Dr. Lucas Hutton, Baptist College; Ed Lane, Richland County Schools; Sarah Purcell, North Augusta YMCA. COI are not authorized to invite guests. Place code "C" next to each name.
- c. The completed form will be attached to the completed UF 601-2.1 which was used to request the event. A copy of the UF 601-2.2 will be provided to the appropriate recruiter.

COI Event Afteraction Report (For use of this form see USAREC Reg 601-2)		
<b>To:</b> Commander, Columbia Rctg Bn 1835 Assembly St. Rm 733 Columbia, SC 29201	<b>From:</b> Commander, Columbia Rctg Co 1835 Assembly St Rm 828 Columbia, SC 29201-2446	<b>Date:</b> 06/13/2015
<b>Section I Summary</b>		
<b>Control Number</b> _____	<b>Date and location held</b> 13 June 2015 _____	
<b>No. of Military/DOD hosts</b> 6 _____	<b>No. COI</b> 25 _____	<b>No. TAIR/speakers</b> 1 _____ <b>Total Attendance</b> 32 _____
<b>Cost per person</b> \$26.00 _____	<b>Total cost</b> \$832.00 _____	<b>No. of leads generated</b> 4 _____
<b>No. of requests for recruiter services</b> 12 _____	<b>No. of pledges of support</b> 20 _____	
<b>Other beneficial results, feedback, problems or recommendations:</b> State employment rep will provide display space. School system will ASVAB all juniors and seniors next year.		<b>Leads (indicate name of referral):</b> Dave Stewart-phone 555-1234 (Ron Williams) Amie DiOrio-phone 555 2345 (Bill Barker) Paul Swafford-555-3456 (Bill Barker) John Smith-phone 555-4567 (Ron Williams)
<b>Section II Attendees</b> <i>Print name, title, and category for all attendees. H=host (military or DOD) and C=COI</i>		
CPT Houston Cdr, Columbia Rctng Co(H)	Mr. Ron Willis Dir, State Employment Office (C)	Ms. Suzanne Worthington Financial Aid Dir, USC(C)
Mr. Robert Gearheart ESS, Columbia Rctg Bn (H)	Dr. Lucas Whitmore Dean, Student Services Baptist College (C)	Ms. Karen Flowers Counselor, Wagner-Salley HS (C)
SFC Ward Maddox Station Leader, Columbia RS (H)	Mr. Ed Lane Dir, Student Services Richland County Schools (C)	Mr. Earl Pitts Automotive Instructor, Aiken Tech College (C)
Mrs. Sophie Maddox wife of SFC Maddox (H)	Ms. Sarah Purcell Dir, N. Augusta YMCA (C)	Mr. Gary Burbank Journalism teacher, Midland HS (C)
MG Raymond Jordon GOSP speaker (H)	Mr. Terry Crawford Teacher, N. Augusta HS (C)	Ms. Patricia Snyder Principal Beech Island HS (C)
SFC Steven Irving Cinema Van NCOIC (H)	Mr. Clint Brown Teacher, Aiken Technical College (C)	Ms. Marilyn Packman Counselor, Beech Island HS (C)
Mr. Bill Barker Counselor, Aiken HS (C)	Ms. Mary Jane Johnson Counselor, Richland HS (C)	Mr. Tony Vertrees Counselor, Barnwell HS (C)
USAREC Form 601-2.2, 25 June 2015 (THIS FORM REPLACES USAREC FORM 545) V1.00		

Figure C-1. Sample of a completed USAREC Form 601-2.2

<b>Attendees (Continued)</b> <i>Print name, title, and category for all attendees. H=host (military or DOD) and C=COI</i>		
Mr. Larrs Eveslage Football coach, Aiken HS (C)	Ms. Lottie Smith Counselor, South Aiken HS (C)	Mr. Hank Rivers Mayor, Aiken, SC (C)
Mr. Dave Wirth Principal, South Aiken HS (C)	Mr. Dave Politi Band Director, South Aiken HS (C)	Ms. Britney Sears Counselor, N. Augusta HS (C)
Ms. Roberta Herrman Principal, N. Augusta HS (C)	Mr. Berris Napier Counselor, Columbia HS (C)	Mr. Charles Taylor Principal, Columbia HS (C)
Mr. Kevin Olesky Job placement Counselor (C)		
<b>Signature of preparer:</b> 		

USAREC Form 601-2.2, 25 June 2015 (Reverse)

Figure C-1a. Sample of a completed USAREC Form 601-2.2 (continued)



## Appendix D COI Event Checklist

### D-1. General

Checklist for recruiters, center commanders, company commanders, and battalion points of contact and budget personnel. This checklist presents procedures for a standard COI event. There are exceptions. For instance when battalions sponsor doughnuts and coffee at an education conference, it is difficult to have a completed UF 601-2.2.

### D-2. Before the event

a. Center commanders and recruiters:

(1) Construct a preliminary invitation list, UF 601-2.1, and a plan for the event to include agenda, names of presenters, and summary of objectives sought. Select date and location.

(2) Develop a COI Engagement Plan in order to effectively engage COIs. See Figure D-1 for minimum information required.

## BECKLEY BN COI Engagement Plan

Name and Position	New or Existing	Recommended by	Message	Effect
Ms. Susan Pollock, Volunteer	New	CPT Lemus	She will be volunteering her time as an admin assistant for all necessary administrative work required to start up the Bethel HS Racing Pilot Program. She will help develop a Non-profit 501-C3 application for Bethel HS Racing Pilot Program. She will submit letters for student internship awards, to be awarded for top performing team members. Will also assist in any legal items needed for the program.	Help enhance our relationship with our High Schools and community leaders.
Mr. Steve Rodgers, Owner HRACING Sports	New	CPT Lemus	Mr. Rodgers is one of the instructors/teachers for the Bethel HS Racing Pilot Program. Steve will also be an assistant Marketing and Practice Coach for the Bethel High School Racing Program set to start in fall 2009.	Help enhance our relationship with our High Schools and community leaders.
Mr. Chris Florian, Instructor Bethel HS	New	CPT Lemus	Mr. Florian is someone we want to have as an instructors/coach for the Bethel HS Racing Pilot Program set to start in fall 2009.	Help enhance our relationship with our High Schools and community leaders.
Ms. Sarah Wells- Umbarger, Ast. Dir. Talent Search, Upwards Bound, Va Tech,	New	CPT Miller	Assistant Director of Upwards Bound/Talent Search, VT-associated program which provides guidance and support for underprivileged youth needing help with career planning, to include college applications and financial aid.	Access to targeted population of High School Seniors and Juniors who are looking for help in going to college. Spans four Station Areas
Mr. Dir. Talent Search, Upwards Bound, Va Tech.	New	CPT Miller	Director of Upwards Bound/Talent Search, VT-associated program which provides guidance and support for underprivileged youth needing help with career planning, to include college applications and financial aid.	Access to targeted population of High School Seniors and Juniors who are looking for help in going to college. Spans four Station Areas

Figure D-1. Example COI Engagement Plan

(3) Make preliminary inquiries with a proposed vendor to develop a menu and cost estimate to include gratuity, as applicable. Generally, states do not require the Government to pay taxes on contracts as a courtesy. (However, when preparing your cost estimate, if you aren't sure, include them.) Be sure you don't make a firm commitment for the event or you may be liable to pay for it from personal funds.

(4) Provide information needed for the request on UF 601-2.1 and submit to company headquarters. Once request is approved, ensure invitees are notified and follow-up reminder calls are made according to vendor suspense so meal count can be adjusted with vendor. Recruiters, center commanders, and company commanders who fail to ensure proper follow-up is conducted may be held financially liable for the cost of meals for no-shows.

b. Company commanders: Prepare UF 601-2.1. Send to your battalion, ATTN: COI Program Manager, for approval. Don't proceed with event arrangements until you get this approval.

c. Battalion program managers:

(1) Review request for accuracy and compliance with regulations and guidance. Secure signature of battalion commander or authorized representative.

(2) If all event requirements are met and no requests for exception are required, secure a control number from the battalion COI program manager. Notify the affected company commander of the approval and send UF 601-2.2 for completion.

(3) UF 601-2.1 will be forwarded to the brigade if their approval is necessary for high-cost events. A cover memorandum will contain justification for the request.

(4) When appropriate approvals are obtained, forward the request to the battalion. Prepare a DA Form 3953 (Purchase Request and Commitment) to support the event, if the GPC is not used. A fund cite will be added by budget personnel.

d. Battalion budget officer:

(1) Review UF 601-2.1 and the DA Form 3953. A fund citation will be inserted if funds are available and the GPC card is not being used.

(2) Battalion procedures for contracting apply at this point.

### **D-3. After the event**

a. Company commanders:

(1) Complete UF 601-2.2.

(2) Send completed UF 601-2.2 and all vendor receipts to the battalion COI program manager within 3 working days after the event. For events requiring brigade or higher approval, provide a copy to the brigade POC.

(3) Send copy of completed UF 601-2.2 to appropriate recruiter.

b. Battalion program manager.

(1) Review UF 601-2.1, UF 601-2.2, and bill invoice for accuracy and compliance with regulations and guidance. Send, the bill, invoice, and register receipt to the battalion budget officer. Forward UF 601-2.2, UF 601-2.1, and a copy of the invoice to the battalion commander for review and submission to the brigade, ATTN: COI event point of contact. Ensure all forms are included in the MMS activity as an attachment. Submit AAR and close the MMS activity.

c. Battalion budget—Send, the bill, invoice, register receipt, UF 601-2.2, and UF 601-2.1 forward for payment.

## **Appendix E**

### **Army Medical Department Educator/Centers of Influence Tour Program**

#### **E-1. Purpose**

This appendix provides policy guidance for the E/COI Tour Program for health care professionals and establishes procedures for conducting an E/COI tour.

#### **E-2. Objectives**

a. Provide tours of Army health care facilities to educators and other COIs to improve their knowledge of Army medicine and the professional opportunities available within the Army health care system.

b. Support the recruiting field force by improving recruiter access to health care-related professional schools and health care organizations.

c. Improve the potential to recruit and access world-class health care professionals.

d. Solicit support from E/COIs to improve access to schools, programs, and professional organizations.

e. Obtain enrollment and directory information.

f. Schedule Total Army Involvement in Recruiting events and other recruiting events.

g. Encourage referrals.

#### **E-3. Policy**

a. E/COI tours are designed to be professionally enriching experiences for educators and key influencers. Tours are designed to give such influencers factual, firsthand information on the Army's world-class health care system and the role, mission, and function of Army health care professionals.

b. Tour participants will be those individuals who are either key decision makers or those who can assist recruiters gain access to critical markets, programs, and individual applicants.

c. Participant limitations.

(1) Minimum number of E/COI participants is 14. The number does not include escorts. The brigade commander must approve exceptions to conduct tours with fewer than 14 participants.

(2) Escorts will not exceed two escorts for up to 14 participants and three escorts for 14 to 40 participants.

(3) Husbands and wives will not participate on the same tour at Government expense (avoid any appearance of junketing). Similar restrictions apply to other family members. An individual educator or COI may only participate in one E/COI tour in a 3-year period.

(4) Tour participants will be selected based on targeting a specific mission, such as nursing, or multidisciplinary, such as mixing medical, dental, nursing, veterinary, and allied health professionals all in one tour. If the tour participants are multidisciplinary, tour organizers will ensure that the tour incorporates exposure to each area of specialization and provide a global view of Army medicine. If the tour participants are a “targeted” group, then the tour will include maximum exposure to that specific discipline. As an example, if the tour targets nursing, it will include exposure to all missions and functions of a variety of nursing specialties, education and training options, leadership opportunities, etcetera.

d. Geographic limitations:

(1) Medical recruiting battalions (MRBns) will combine E/COI tours in order to facilitate cross-fertilization of health care professionals, maximize exposure of an AMEDD’s state-of-the-art facilities, minimize the number of tours to any specific facility, and maximize consolidation of resources. A tour may utilize any AMEDD facility, despite geographic location, as long as such selection is justified based on the composition of the tour attendees and approved by each MRBn commander.

(2) Recommended tour facilities include, but are not limited to: Walter Reed Army Medical Center in Washington, DC; Brook Army Medical Center at Fort Sam Houston, TX; Madigan Army Medical Center at Fort Lewis, WA; Eisenhower Army Medical Center at Fort Gordon, GA; and Womack Army Community Hospital at Fort Bragg, NC. A tour may utilize AMEDD research facilities and other special function facilities as necessary, based on the target population and intent of the tour.

(3) The USAREC CoS may authorize tours to Tripler Army Medical Center in Hawaii as an ETP on a case-by-case basis. Requests will be forwarded to the U.S. Army Medical Recruiting Brigade (MRBde), ATTN: RCMRB, 1307 3rd Avenue, Fort Knox, KY 40121-2725, with the proposed dates at least 120 days prior to the tour and require approval by the USAREC CoS.

e. Tour cancellations. Invitations to E/COI participants are to be issued with the understanding that if the tour has to be canceled (due to insufficient participation or other circumstances), such cancellation will be announced 48 hours prior to departure. Medical recruiting center commanders or appropriate tour organizers will contact all invitees not earlier than 3 days prior to tour departure to confirm attendance. If tour participation falls below 14, the project officer or tour director will either cancel the tour or request an exception to hold the tour with less than 14 participants from the MRBde commander.

f. News media. News media participants may accompany E/COI tour’s with the approval of the PAO of the installation hosting the tour.

g. Tours will not exceed 3 days, excluding travel. A tour day will usually consist of 8 hours with a lunch break. It does not preclude arranging for the E/COI participant to voluntarily participate in organized free-time activities such as dinner at the officer’s club or tour of the area’s historic sites. Each day of the tour requires a detailed itinerary to include a chronological listing of all tour events, names of all presenters, special instructions, and directions as needed.

#### **E-4. Responsibilities**

a. Commanding General, USAREC, will exercise overall supervision of the AMEDD E/COI Tour Program (see para 6a). The MRBde has the authority to approve or disapprove ETPs that pertain to participants, escorts, and tour sizes.

b. MRB will manage fiscal requirements for AMEDD E/COI tours in coordination with the individual brigades.

c. MRBde commander will:

(1) Serve as proponent for inquiries on the conduct of the AMEDD E/COI Tour Program generated at the MRBde and MRBns.

(2) Receive and review AARs for each AMEDD tour conducted. Submit such reports within 2 weeks of tour completion.

(3) Evaluate and process MRBde tour requests for exceptions and provide HQ USAREC approval or disapproval for the commander.

(4) Provide program guidance to MRBn commanders.

(5) Serve as proponent for the tour program. Quantify the value-added benefits of AMEDD tours, based on input from AARs.

- (6) Serve as HQ USAREC point of contact, with Army installation staff offices handling E/COI tours.
- d. MRBn commanders will:
  - (1) Exercise overall supervision of the MRBn-sponsored AMEDD E/COI tour.
  - (2) Monitor and control all E/COI tours to ensure maximum participation and efficient use of resources.
  - (3) Review and approve all requests for AMEDD E/COI tours.
  - (4) Review all AARs and forward to HQ USAREC, ATTN: RCHS, 1307 3rd Avenue, Fort Knox, KY 40121-2725, within 2 weeks of tour completion.
  - (5) Provide necessary funding and staff support for AMEDD E/COI tours.
- e. Medical recruiting company (MRC) commanders will:
  - (1) Appoint a tour project officer to plan, manage, coordinate, and accompany the tour as an escort.
  - (2) Establish procedures for utilizing funds allocated from the MRBde to ensure invitees and participants meet the E/COI objectives established.
  - (3) For resource planning and projection, prepare a preliminary annual AMEDD tour plan by 15 August for the MRBde commander's approval. Level of detail should be an overall objective, target number of invitees, site location, and estimated cost. Lock in actual dates and itinerary no later than 90 days out from projected tour start date.
  - (4) Evaluate all tour invitee lists to ensure they meet the E/COI tour objectives.
  - (5) Accompany all AMEDD E/COI tours as an escort. If more than one MRC is participating, only one MRC commander must accompany the tour. Others commanders may attend as deemed necessary.
- (6) Task medical recruiting center commanders for:
  - (a) Names and job positions of all E/COI tour invitees in addition to school and residency programs by area of concentration.
  - (b) Recommendations for the target audience and tour sites.
- f. MRBn tour project officers will:
  - (1) Plan, manage, coordinate, and accompany tour as an escort. Refer to paragraphs 6g(1) through (15) for responsibilities. MRBn requests for E/COI tour approval and ACOM support requests for an E/COI tour should follow the same format as the battalions.
  - (2) Complete E/COI AAR and forward to the MRBde within 2 weeks following the completion of the tour. Send AARs in memorandum format through the MRBde commander to HQ USAREC, ATTN: RCHS. The reports will contain the following: Date, location, and total cost of the tour. The overall objective of the tour (short paragraph on the target audience, reasons for choosing a specific site, expected outcomes in terms of COI development, access to new schools, etcetera). The quantitative assessment of invitee's feedback (based on surveys). The discussion of escorts' feedback, and quantitative feedback from installation to include speaker feedback if available. The paragraph on the overall assessment of the tour, the paragraph on lessons learned, and an attached list of invitees to include the name, profession (administrator, dean of medical school, etcetera), and place of employment.
  - (3) Develop an AMEDD E/COI tour checklist. Follow the format in table 2.
  - (4) If required by the MRBde commander, complete, submit USAREC Form 601-2.3, (in the "Type of Tour" block of the form insert AMEDD). All other information is self-explanatory.

## **Glossary**

### **Section I**

#### **Abbreviations**

##### **AAR**

After Action Report

##### **ACOM**

Army Command

##### **AIT**

Advanced Individual Training

##### **AMEDD**

Army Medical Department

##### **AMO**

Acquisition Management Oversight

##### **APA**

Advertising and Public Affairs

##### **ASVAB**

Armed Services Vocational Aptitude Battery

##### **BT**

Basic Training

##### **CG**

Commanding General

##### **COI**

Center of Influence

##### **CoS**

Chief of Staff

##### **DA**

Department of the Army

##### **DTS**

Defense Travel System

##### **DOD**

Department of Defense

##### **E/COI**

Educator/Centers of Influence

##### **ETP**

Exception to Policy

##### **ESS**

Education Services Specialist

**FS**

Future Soldier

**FY**

Fiscal Year

**GPC**

Government Purchase Card

**GSA**

U.S. General Services Administration

**HQ**

Headquarters

**HQUSAREC**

Headquarters, U.S. Army Recruiting Command

**HS**

High School

**ITO**

Invitational Travel Order

**JER**

Joint Ethics Regulations

**JROTC**

Junior Reserve Officer Training Corps

**LZ**

Leader Zone

**MAC**

Marketing Activity Code

**MDW**

Military District of Washington

**MICC**

Mission and Installation Contracting Command

**MMS**

Enterprise Marketing Management System

**MRBde**

Medical Recruiting Brigade

**MRBn**

Medical Recruiting Battalion

**NFE**

Non-Federal Entities

**PAO**  
Public Affairs Officer

**POC**  
Point of Contact

**REA**  
Recruiter Expense Allowance

**ROTC**  
Reserve Officer Training Corps

**RS**  
Recruiting Station

**RZ**  
Recruiter Zone

**SOP**  
Standard Operating Procedures

**TAIR**  
Total Army Involvement in Recruiting

**TDY**  
Temporary Duty Assignment

**UF**  
USAREC Form

**UR**  
USAREC Reg

**USAREC**  
US Army Recruiting Command

## **Section II**

### **Terms**

#### **Centers of influence**

Persons who, because of their title, role, or position, are capable of assisting the recruiting effort.

#### **Centers of influence event**

A USAREC-sponsored seminar, clinic, or presentation designed to communicate information concerning Army opportunities to COI. A meal or refreshment period may be included incidental to the purpose of the gathering.

#### **Combined educator/centers of influence tour**

A tour consists of participants from two or more battalions.

#### **Educator/centers of influence**

Individuals who can help develop a better image of the Army, influence individuals to enlist, or refer names of leads to Army recruiters. E/COIs are primarily educators but may include civic or business leaders, members of professional groups, news media representatives, or other influential individuals.

**Educator/centers of influence tours**

A tour of Army installations to observe BT, Soldier quality of life, recreation centers, education centers, and technical training to create a better awareness and understanding of the Army.

**High cost event**

An event or function which exceeds the cost guidelines set forth at paragraph 4h.

**Lead**

A name with an address, telephone number, or e-mail address and for who no appointment has been made for an Army interview.

**Lead battalion**

Plans, organizes, and controls a combined E/COI tour. Assumes command responsibility for all participants while on the tour.

**Prospect**

A person who has agreed to an appointment for an Army interview.

**Regular educator/centers of influence tour**

A tour of 14 or more participants planned and conducted by one battalion solely for its own participants. All organizational and functional responsibilities are tasked to the appointed battalion project officer.

**Sponsor**

The USAREC commander or leader who originates the request for a COI event. In cases of doubt, this commander should be the first common superior of all organizations who will share in sponsoring the event.

**Undersize educator/centers of influence tour**

An E/COI tour with less than 14 participants. An undersized tour requires brigade commander approval to proceed.



# USAREC

**ELECTRONIC PUBLISHING SYSTEM**

<b>DATE:</b>	<b>25 June 2015</b>
<b>DOCUMENT:</b>	<b>USAREC REG 601-2</b>
<b>SECURITY:</b>	<b>UNCLASSIFIED</b>
<b>DOC STATUS:</b>	<b>NEW/REVISION</b>