



UNITED STATES MARINE CORPS

3D MARINE DIVISION (-) (REIN), FMF
FPO SAN FRANCISCO, CA 96602-8500

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3D MARINE DIVISION
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DivO 5214.2D
Adj
11 MAR 1991

DIVISION ORDER 5214.2D

From: Commanding General
To: Distribution List

Subj: INFORMATION REQUIREMENTS (REPORTS) MANAGEMENT PROGRAM

Ref: (a) MCO 5214.2D
(b) MCO P5214.1G
(c) DivO P5000.3F

Encl: (1) Report Evaluation Checklist
(2) Reports Approval Request
(3) Reports Inventory

1. Purpose. To implement policy, assign responsibilities and set forth guidance for the management and control of information requirements within the 3d Marine Division.

2. Cancellation. DivO 5214.2C.

3. Background

a. Each reporting requirement within the 3d Marine Division represents an investment in time and manpower, therefore it is imperative that all reports required by this Command contain only necessary information, not be duplicative in nature, and require a minimum of administrative procedures.

b. Reports management is needed to ensure reports and reporting systems provide necessary information effectively, efficiently, and economically. Specific types of data are needed to meet particular requirements. Reports are the major means for providing this data. Reports management encompasses the development of reports and reporting systems. As conditions or needs change, reports management must provide the control of reporting requirements to ensure minimum burden is expended and maximum effectiveness obtained.

c. Reference (a) sets forth policy and guidance relative to the management of reports in the Marine Corps. Reference (b) sets forth the proper format for requiring a report on a directive. Reference (c) designates appropriate staff section codes to use in deriving the reports control symbol.

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4. Summary of Revision

a. Paragraph 5b(4) requires Division General and Special Staff Sections to ensure that all reports which fall under their cognizance are properly and promptly submitted to higher headquarters.

b. Paragraph 6 changes the format of the Report Control Symbol.

5. Action

a. Division Adjutant. The Division Adjutant is the Reports Management Officer for this Headquarters and is responsible for:

(1) Ensuring an annual review of information requirements within the Division is conducted to ascertain need and/or validity. A requirement will not be considered necessary or valid if it is duplicative in nature or requires marginal information. Reports that are not considered valid will be referred to the cognizant staff section for revision or cancellation.

(2) Conducting a detailed report analysis, using enclosure (1), prior to forwarding a new report to the Chief of Staff for approval.

(3) Assigning a Division Reports Control Symbol (DRCS) to all applicable reports as outlined in paragraph 6 below.

(4) Publishing, on an annual basis, a bulletin listing all current required reports within the Division. The bulletin will include reports submitted to this Headquarters as well as those submitted to higher headquarters.

b. Division General and Special Staff Sections. General and Special Staff Sections are responsible for monitoring their reporting requirements and will ensure that the following is accomplished:

(1) Prior to establishing a reporting requirement, thoroughly evaluate the need for the information and investigate other options for obtaining it (i.e., reports already in existence). If a report is required, complete enclosure (2) and submit it to the Chief of Staff via the Division Adjutant for approval.

(2) At the designated time conduct an annual review of all reporting requirements utilizing enclosure (3) to evaluate validity of and continuing need for a report.

(3) When it is determined that a reporting requirement is no longer valid, publish a change to the requiring directive deleting the report.

(4) Ensure that all reports which fall under their cognizance are forwarded to higher headquarters on time and in the proper format.

6. Report Control Symbol (RCS)

a. Enclosure (1) to reference (a) lists those types of reports that are exempt from the Reports Management Program and will not require an RCS.

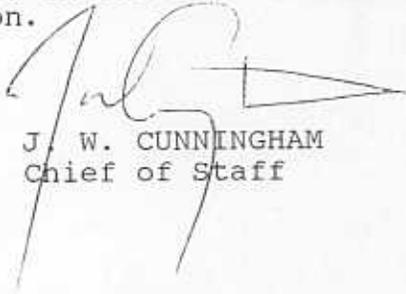
b. Each recurring report required by this Headquarters, with the exception of those discussed in paragraph 6(a) above, will be assigned a DRCS. If the report is required in response to a requirement from higher headquarters, a DRCS will not be assigned, rather, the Division directive requiring the report will make reference to the higher headquarters' RCS in the Reports Required Section, per reference (b).

c. DRC's will consist of the staff section code as outlined in reference (c), followed by a four digit number consisting of the standard subject identification code (SSIC) of the directive. Following the SSIC will be a two digit number identifying the number of the report. For example, a Division Adjutant recurring report required by this Order would be identified as Adj-5214-01. Two additional reports required by the same order would be identified as Adj-5214-02 and Adj-5214-03.

d. Reports required on a one time basis will be assigned a DRCS as described above, but the letters OT will follow the SSIC vice a two digit number. For example a Division Adjutant one time report required by this Order would be identified as Adj-5214-OT.

e. The Division Adjutant will maintain a record of all assigned DRC's. Once a reporting requirement is cancelled, the DRCS will not be used again.

7. Minimize. When minimize is imposed for electronically transmitted information, reports will be sent via alternative means unless the information contained in the report will effect the combat readiness of the Division.


J. W. CUNNINGHAM
Chief of Staff

DISTRIBUTION: A/D

REPORT EVALUATION CHECKLIST

REPORTS EVALUATION CHECKLIST	REVIEW DATE
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REPORT TITLE _____

S SECTION 1 - DETERMINE THE NEED

INSTRUCTIONS: Check either column (b) or (c) If questionable, show changes in column (d) (a)	QUESTION- ABLE (b)	SATISFAC- TORY (c)	PROPOSED CHANGES (Attach Additional Sheets, if Needed) (d)
1. THE REPORT AS A WHOLE. Who uses it? How? what is its purpose? Should it be continued?	A		
2. USE OF EACH ITEM. Is every item used? Any missing items to be added?	M		
3. USE OF EACH COPY. Are all copies used to good advantage?	M		
4. FUNCTIONAL RELATIONSHIP. Is the information within the scope of the office functions?			
5. MISAPPLICATION. Does the report try to solve a problem which should be solved by other means?	P		
6. STAND-BY DATA. Is the data obtained for "just-in-case" use?		L	
7. ANOTHER AVAILABLE SOURCE. Is the data available in another report or office?		L	
8. BY PRODUCT. Is it possible to get the data by some other process?			E
9. DIRECT USE OF RECORDS. Could actual records or "last copy" of record be used instead of a report?			E

ENCLOSURE (1)

REPORTS EVALUATION CHECKLIST

REVIEW DATE

REPORT TITLE

INSTRUCTION: Check either column (b) or (c) If questionable, show changes in column (d) (a)	QUESTION- ABLE (b)	SATISFAC- TORY (c)	PROPOSED CHANGES (Attach Additional Sheet, if Needed) (d)
10. SAMPLING. Would a sampling of few offices give reliable data?			
11. EXCEPTION REPORTING. Would it be appropriate to report conditions only when other [] normal?			
12. COMBINATION. Could this report be combined with another report?			
13. NON-RELATED MATERIAL. Are non-related subjects included the same report?			
14. ADEQUACY AND SUITABILITY. Is scope or content tailored to meet needs.			
15. VALUE VS. COST. Is the report worth its cost?			
SECTION 2 - VERIFY THE TIMING			
16. REPORTING PERIODS. Are reporting periods properly stated?			
17. FREQUENCY. Is the present frequency suitable, excessive or inadequate?			
18. PREPARING OFFICE WORKLOAD. Is the due date specifically stated?			
19. PREPARING OFFICE WORKLOAD. Has this been considered? Can due dates changed to avoid peak workloads?			

ENCLOSURE (1)

REPORTS EVALUATION CHECKLIST (Page 2)

REVIEW DATE

REPORT TITLE

SECTION 3 - REVIEW STYLE OF PRESENTATION

INSTRUCTIONS: Check column (b) or (c) If questionable, show changes in column (d) (a)	QUESTION- ABLE (b)	SATISFAC- TORY (c)	PROPOSED CHANGES (Attach Additional Sheets, if Needed) (d)
20. REPORT TITLE . Is it the same as, or listed in the directive?			
21. PURPOSE OF REPORT. Is it clearly stated?			
22. REPORTING INSTRUCTIONS . Are reporting instructions clear and adequate?			
23. INTEGRATED REPORTING . Are data needs of other levels included.			
24. FEEDER REPORTS. Are procedures for feeder reports provided to assure uniformity and simplicity?			
25. REPORTING UNITS . Are reporting units shown? Are there too many, too low?			
26. NEGATIVE REPORTS . Are negative reports required? What use is made to them?			
27. NUMBER OF COPIES . Are number of copies specified?			
28. ROUTING . Are correct mailing addresses given?			
29. NARRATIVE OR FORM . Is the best format for this report used?			
30. ARRANGEMENT AND SIZE . Are items sequenced according to user			

SAMPLE

ENCLOSURE (1)

REPORTS EVALUATION CHECKLIST (Page 2)

REVIEW DATE

REPORT TITLE

INSTRUCTIONS: Check either column (b) or (c) If questionable, show changes in column (d) (a)	QUESTION- ABLE (b)	SATISFAC- TORY (c)	PROSED CHANGES (Attach Additional Sheets, if Needed) (d)
need? Is spacing adequate? Are item captions clear? Is size adequate and practical?			
31. STANDARDIZATION . Do all offices use the same forms or format?			
32. SUMMARY INFORMATION . Would a summary of information rather than statistics or a narrative be better?			
33. CUMULATIVE DATA . Can data be maintained on a cumulative basis to eliminate last-minute workloads?			
34. COMPARISONS . Are comparisons made against goals, past performance, or current performance of others?			
35. GRAPHICS . Are graphics used to good advantage?			
36. AUTHENTICATION . Are verifying or approving officials' signatures used only when necessary?			
37. DATA SOURCES . Are records from which reports are to be prepared identified?			
38. ARRANGEMENT OF RECORDS . Should records be rearranged to simplify reporting?			
39. REPORT SYMBOL . Is it shown after title of report?			
40. STYLE OF PRESENTATION . Does the overall report provide clarity and simplicity?			

ENCLOSURE (1)

REPORTS APPROVAL REQUEST

1. SUBMIT TO		2. REPORT (Check applicable boxes)	
A. CENTRAL OFFICE (ORCP)	A. TYPE	B. ACTION	
3. REGION (Specify)	<input type="checkbox"/> INTERAGENCY <input type="checkbox"/> INTERNAL	<input type="checkbox"/> NEW <input type="checkbox"/> CANCEL	<input type="checkbox"/> REVISE <input type="checkbox"/> EXEMPT <input type="checkbox"/> CONTINUE

INSTRUCTIONS complete and submit an original and two copies of this form to request the clearance and evaluation of all new or revised interagency or internal reporting requirements that are subject to the GSA Reports Management Program (Refer to OAD P1872.2B). Attach a supporting statement that fully justifies the need for the requested information, a listing of responding agencies for an interagency report or a listing of responding services and staff offices for internal reports, copies of worksheets used in costing the report, a sample of the report form of format, copies of the prescribing directive or instructions that would be available to respondents, and copies of the cost/benefit evaluation as shown in apps. 4 B thru 4 F of OAD P1872.2B. THIS FORM WILL BE USED FOR THE ANNUAL REVIEW OF REPORTS.

3. OFFICE SYMBOL OF THE ORIGINATOR/USER	4A. PERSON TO BE CONTACTED FOR INFORMATION	4B. CORRIS. SYMBOL	4C. TELEPHONE NO.
5A. TITLE OF REPORT	5B. CURRENT APPROVAL NO.		

6. FREQUENCY OF SUBMISSION OF REPORT (Check)

<input type="checkbox"/> ANNUALLY	<input type="checkbox"/> QUARTERLY	<input type="checkbox"/> WEEKLY	<input type="checkbox"/> ON OCCASION	<input type="checkbox"/> OTHER (Specify)
<input type="checkbox"/> SEMIANNUAL	<input type="checkbox"/> MONTHLY	<input type="checkbox"/> DAILY	<input type="checkbox"/> CONTINGENT	

7. LIST CANCELED OR MODIFIED REPORTS OR FORMS

A. TITLE	B. REPORT APPROVAL NO
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8. SUMMARY OF ESTIMATED REPORTING WORKLOAD

A. NUMBER OF RESPONDENT (Agencies for interagency/offices for internal)
B. NUMBER OF TIMES THIS REPORT SUBMITTED ANNUALLY BY EACH RESPONDENT
C. TOTAL NUMBER OF REPORTS SUBMITTED ANNUALLY (A x B)

ENCLOSURE (2)

9. SUMMARY OF ESTIMATED REPORTING COSTS (Attach worksheets used in costing report)

DESCRIPTION (a)	DEVELOPMENTAL COSTS (b)	ANNUAL OPERATIONAL COSTS (c)	ANNUAL USER (d)
A. REQUIRING OFFICE	\$	\$	\$
B. RESPONDING AGENCIES/OFFICES	\$	\$	
C. TOTALS	\$	\$	\$

10. NAME AND TITLE OF REQUESTING OFFICE APPROVING OFFICIAL

11A. SIGNATURE OF APPROVING OFFICIAL 11B. DATE 12A. SIGNATURE OF REPORTS CONTROL 12B. DATE

BELOW FOR USE OF CLEARANCE AND EVALUATION OFFICE

13. CLEARANCE AND EVALUATION RESULTS

APPROVED (See below) RECOMMEND DISAPPROVAL EXEMPTED (See attached) CANCELED (See attached)

14. ASSIGNED REPORT TITLE

15. ASSIGNED REPORT APPROVAL NO.

16. EXPIRATION OF APPROVAL (Date)

17A. SIGNATURE OF APPROVING OFFICIAL

17B. DATE

ENCLOSURE (2)

REPORTS INVENTORY

REPORTS INVENTORY

Prepared by

Name _____

Date

Organization _____

Telephone _____

S

INSTRUCTIONS

Submit an original and one copy for each report required or prepared by your office. All offices complete Section A. Complete Section B if report is required by your office. Complete section C if report is prepared by your office. Attach sample copy of report and send to agency Report Management Office.

A
SECTION A - IDENTIFICATION DATA

1. Report Title

2. Report Control Symbol
of Number (if any)

3. Form No. or Format
(e.g. memo, tabulation,
narrative, etc.)

4. Requiring Directive or Instructions

5. Frequency (Monthly,
quarterly, etc.)

6. Due date

M

SECTION B - REQUIRING OFFICE DATA

1. Purpose and use of report (Identify other reports for which this report is used as a feeder report.)

2. Offices required to submit report

3. Sources of information
used by preparing offices
to complete report (Form
No., report, file, etc.)

4. No. of copies required

Type

Number

5. Distribution

6. Date report originated

7. No. of revision since

8. Date of last revision

L

9. Estimated cost of developing report

10. Estimated annual cost of using report

11. Current appraisal

a. Is this report
still needed?

YES NO

h. Is data best for
the purpose?

YES NO

i. Combining with
others?

YES NO

E

ENCLOSURE (3)

		YES	NO			YES	NO			YES	NO
N E E D VAL- UE DATE	b. Is every item still needed?			D A T A	i. Is comparative Data needed?			I M P P O R T S O S V I E B M L E E N T S	p. Making easier to complete?		
	c. Is the report needed as often?			A	j. Is report clear and easy to use?				q. Using a form if not used?		
	d. Is every copy still needed?			I N S T R U C T I O N S	k. Are there written instructions?				r. Stopping negative reports?		
	e. Is there another source?			R U C I O N S	l. Are they clear concise, complete, current?				s. Using summary?		
	f. Is it worth its probable cost?			T I D E S	m. Are they issued in a formal directive?				t. Using sampling?		
	g. Does the due date give enough time?			A N S W E R S	n. Are illustrations needed?				u. Reporting by Exception?		
									v. Changing source?		
							w. Changing sequence?				

SECTION C - PREPARING OFFICE DATA

1. Sources of information for Completing report	2. No. of copies Prepared	3. Distribution (original and copies)
4. Estimated annual cost of prepare report	5. Estimated annual cost for collecting and maintaining information needed for report	

ENCLOSURE (3)