



DoD INSTRUCTION 1215.08

SENIOR RESERVE OFFICERS' TRAINING CORPS (ROTC) PROGRAMS

Originating Component: Office of the Under Secretary of Defense for Personnel and Readiness

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Approved by: Peter Levine, Performing the Duties of the Under Secretary of Defense for Personnel and Readiness

Purpose: In accordance with the authority in DoD Directive 5124.02, this instruction establishes policy, assigns responsibilities, and prescribes procedures for DoD oversight of the Military Departments' Senior ROTC programs (referred to in this instruction as "ROTC programs").

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SECTION 1: GENERAL ISSUANCE INFORMATION

1.1. APPLICABILITY. This issuance applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the DoD (referred to collectively in this issuance as the “DoD Components”).

1.2. POLICY. It is DoD policy that:

a. Pursuant to Chapter 103 of Title 10, United States Code (U.S.C.) and consistent with this instruction, the Senior ROTC program is designed to prepare selected students (cadets and midshipmen) for appointment as commissioned officers in the Military Services. Such ROTC programs must include a conceptual awareness of war and armed conflict, an introduction to Service roles and missions, and a basic understanding of joint and combined operations.

b. All decisions regarding the establishment, operation, maintenance, assessment, and disestablishment of ROTC units must be based on the most efficient allocation of limited resources to meet the specific needs of the Military Department concerned and be carried out in accordance with the requirements found in Chapter 103 of Title 10, U.S.C. and this instruction.

1.3. INFORMATION COLLECTIONS. The ROTC Resources Summary Report, referred to in Paragraph 3.15 of this issuance and including DD Form 2609, “Reserve Officers Training Corps Resources Summary Report” and DD Form 2611, “Reserve Officers Training Corps Enrollment Data,” has been assigned report control symbol DD-P&R(A)1874 in accordance with the procedures in Volume 1 of DoD Manual 8910.01. The expiration date of this information collection is listed in the DoD Information Collections System at <https://apps.osd.mil/sites/dodiic/Pages/default.aspx>.

SECTION 2: RESPONSIBILITIES

2.1. UNDER SECRETARY OF DEFENSE FOR PERSONNEL AND READINESS (USD(P&R)). The USD(P&R):

- a. Provides DoD oversight and management of ROTC programs.
- b. Establishes overall policy and provides implementing guidance regarding the conduct, procedures, and administration of ROTC programs.

2.2. ASSISTANT SECRETARY OF DEFENSE FOR MANPOWER AND RESERVE AFFAIRS (ASD(M&RA)). Under the authority, direction, and control of the USD(P&R), the ASD(M&RA):

- a. Serves as the DoD focal point for matters affecting ROTC programs and resolves matters of conflict that may arise among the Military Departments.
- b. Assesses and monitors ROTC operations to ensure cost-effective employment of resources to accomplish the ROTC mission.
- c. Develops policy and provides guidance for DoD oversight and management of ROTC programs.
- d. Monitor and enforce ROTC access and operation at institutions of higher education per Section 983 of Title 10, U.S.C. and 32 C.F.R. Part 216.

2.3. ASSISTANT SECRETARY OF DEFENSE FOR HEALTH AFFAIRS. Under the authority, direction, and control of the USD(P&R), the Assistant Secretary of Defense for Health Affairs establishes medical standards for enrollment and continuation in ROTC programs in DoD Instruction 6130.03 that are applied through the DoD Medical Examination Review Board.

2.4. UNDER SECRETARY OF DEFENSE FOR POLICY. The Under Secretary of Defense for Policy coordinates with the Department of State to designate countries from which foreign students may be formally enrolled into an ROTC program in accordance with Sections 2103 and 2111b of Title 10, U.S.C.

2.5. SECRETARIES OF THE MILITARY DEPARTMENTS. The Secretaries of the Military Departments.

- a. Establish, operate, monitor and assess, and disestablish ROTC units in accordance with Chapter 103 of Title 10, U.S.C., Military Department policy, and this instruction.

- b. Ensure appropriate oversight and management of their Military Department's ROTC program.
- c. Establish procedures for ROTC program directors to coordinate with the institutions at which programs are located to ensure the program's facilities are provided adequate force protection and physical security.
- d. Develop quantified performance measures to be used in annual assessments that evaluate the extent to which each unit is meeting the strategic goals and objectives of their Military Service's ROTC program.
- e. Coordinate with the Office of the USD(P&R), and the other Military Departments, on any plans to establish or disestablish ROTC units before releasing such information or initiating any such actions.
- f. Develop and implement scholarship programs, as needed, to increase enrollment in:
 - (1) Regional studies and language training in regions and languages of strategic importance to the DoD. Scholarships may be structured, as funds permit, to support study abroad opportunities, including language immersion and associated cadet or midshipman travel, as well as course work at the host institution.
 - (2) Academic degree programs of strategic importance to the Military Department concerned. Examples may include, but are not limited to, degree programs in fields related to science, technology, engineering, or mathematics.
- g. Enter into a written contract with persons who agree to conditions stipulated in this instruction, and required by Chapter 103 of Title 10, U.S.C., as a condition of either enrollment in the advanced course or of providing an ROTC scholarship.
- h. Determine the period of active duty to be served by an ROTC scholarship recipient.
- i. Establish criteria, guidance, and procedures when providing a contracting bonus to selected cadets and midshipmen in accordance with Section 336 of Title 37, U.S.C.
- j. Prescribe regulations on:
 - (1) Conduct and discipline that addresses and prohibits hazing, sexual harassment, sexual assault, and any other unacceptable conduct, actions or circumstances, that are deemed inappropriate by the Secretary of the Military Department concerned, by cadets and midshipmen participating in an ROTC program. These regulations will:
 - (a) Provide clear definitions.
 - (b) Be designed to prevent such incidents.

(c) Prescribe disenrollment, suspension, or other adequate punishment for violations and the notification and appeals process for effected cadets to ensure adequate due process before disenrollment.

(2) Cadet or midshipman who decline to accept a commission when offered, fail to complete their course of instruction, or fail to abide by the terms of their written agreement with their Military Service. These regulations will include:

(a) Procedures for determining whether such a breach has occurred.

(b) Standards for determining the period of time for which a person may be ordered to serve on active duty according to Paragraph 3.2.g. of this instruction.

(3) Required drug abuse testing of cadets and midshipmen in accordance with DoD Instruction 1010.01.

k. Establish a program to facilitate the enrollment and instruction of persons from foreign countries as international students at the senior military colleges.

l. Authorize additional practical military training and associated expenditures when it is determined that such training serves the best interest of the Military Department concerned.

m. Collect, maintain, and submit information on resources in support of ROTC programs as outlined in Section 3.

n. Beginning in fiscal year (FY) 2018, and then every four years thereafter, conduct a quadrennial review to validate the content, organization and relevance of ROTC Training Materials and academic curricula.

SECTION 3: PROCEDURES

3.1. ESTABLISHMENT AND MAINTENANCE OF ROTC UNITS.

a. The decision to establish and maintain an ROTC host or extension unit is the prerogative of the Secretary of the Military Department concerned. All decisions will be based on the most efficient allocation of limited resources to meet the specific needs of the Military Department concerned.

b. To establish and maintain an ROTC unit, an educational institution will:

(1) Apply in writing to the respective Military Department.

(2) Be fully accredited by the appropriate regional accrediting association for post-secondary colleges and institutions.

(3) Agree to provide adequate physical facilities as specified by the respective Military Department.

(4) Certify that no ROTC unit will be established or maintained at a school that unlawfully discriminates with respect to admission or subsequent treatment of students in a manner prohibited under applicable State and federal law, and applicable State and federal regulations and other policies.

(5) Certify that no ROTC unit will be established or maintained at a school that unlawfully discriminates in a manner prohibited under applicable federal and State laws and DoD policy with respect to the assignment of Military Service members and federal employee civilian staff to the ROTC unit; this prohibition applies to any requirements regarding the status, privileges or benefits accorded to such persons under law, DoD policy, State policy or school policy.

c. ROTC units will not be established or maintained at an educational institution unless the following requirements are met. Failure to comply with any of these requirements may constitute grounds for withdrawal of the unit.

(1) The institution fulfills the terms of its contractual agreement with the Secretary of the Military Department concerned.

(2) The senior commissioned officer of the Military Service concerned who is assigned to the program at that institution is given the academic rank of professor, including the appropriate prerogatives and prerequisites associated with the position of a professor, excluding tenure, as head of a department or program at the institution. Other ROTC officers will receive the academic rank of assistant professor or other appropriate academic rank, using procedures comparable to those used for their civilian faculty colleagues.

(3) The institution adopts as a part of its curriculum a 4-year course of military instruction, or a 2-year course of advanced training of military instruction, or both, as prescribed by the Secretary of the Military Department concerned.

(4) The institution agrees to grant credit for ROTC courses and to list ROTC course grades on student transcripts. Credit for ROTC courses will be reviewed by participating institutions on the same basis as other institutional courses. If applicable credit is in question, the institution will recommend adjustments to ensure such courses are granted credit. Regardless of the amount of applicable credit, ROTC course grades must appear on student transcripts.

d. The ROTC program maintains one of four types of affiliations with institutions of higher education, including:

(1) Host Unit. A host unit is located at an institution that has an agreement with a Military Department to maintain an ROTC unit on its campus. Cadets and midshipmen at this institution attend ROTC classes and activities on their own campus. A host unit is manned full-time with staff assigned to that institution.

(2) Extension Unit. An extension unit is located at an institution that has an agreement with both a host ROTC unit and with the ROTC Command of a Military Department to maintain on its campus an ROTC presence extended from the host unit. Cadets and midshipmen at this institution attend ROTC classes and activities on their own campus. An extension unit is manned either full- or part-time with staff assigned from the host unit. The Military Departments will specify in their Service-specific instructions the maximum distance or the maximum average travel time allowed between a host unit and its associated extension unit.

(3) Cross-Town. A cross-town describes an institution that has an agreement with both a host ROTC unit's institution and with the ROTC headquarters of a Military Department that would allow its students to enroll in the ROTC program of the host unit. Cadets and midshipmen at this institution attend ROTC classes and activities on the campuses of the host unit and the cross-town institution if necessary. There is no ROTC staff assigned to this institution. The Military Departments will specify in their Service-specific instructions either the maximum distance or the maximum average travel time allowed between a host and its associated cross-town.

(4) Consortium. A consortium describes an arrangement between multiple ROTC units in order to share resources to maximize efficiency. These resources can include, but are not limited to, facilities, staff, organizational structure, processes, and administrative material. A consortium can consist of host units, extension units, cross-town institutions, or any combination thereof.

e. Before releasing information regarding proposed ROTC units, the Military Department concerned will inform the Office of the USD(P&R) and the other Military Departments a minimum of 60 days before public release.

f. Two or more Military Departments may operate ROTC units on the same campus. However, in these cases, Military Departments are encouraged to collaborate in their efforts and consolidate manpower, curriculum, and resources when possible to more efficiently manage

units, production, and administrative costs. Decisions to collocate additional units will be based on the institution's ability to accommodate the additional unit without affecting the ability of the original units to remain productive.

g. Before final selection of an educational institution to receive a new ROTC unit, a Military Department will:

(1) Coordinate proposed new units with the Office of the USD(P&R) and the other Military Services.

(2) Consult with any Military Department that already has a unit at the institution concerned or is actively considering establishing a new unit at the institution.

(3) Negotiate with the Military Department concerned when problems arise from collocation of two or more ROTC units on the same campus.

(4) Refer unresolvable disagreements to the Deputy Assistant Secretary of Defense for Military Personnel Policy for resolution.

3.2. OPERATION OF ROTC UNITS.

a. Titles of ROTC Units on Campus. The term "Program" instead of "Department" is acceptable as a descriptive term for the ROTC educational activity, provided no extracurricular connotation is involved, and the term is applied in the same manner as other academic programs within the institution.

b. Participation in the ROTC Program. Individuals can be involved in an ROTC program on one of two levels:

(1) **ROTC Students.** ROTC students are individuals that attend the ROTC program classes offered as part of the course of military instruction that has been adopted by the institution as part of its curriculum. There are two types of ROTC students:

(a) **Auditing Students.** Auditing students attend an ROTC class, subject to the approval of the instructor, but do not receive a grade in the class, do not receive credit for taking the class, are not formally enrolled in the ROTC program and pursuant to the participating institution's policy, may or may not be registered in the class.

(b) **Participating Students.** Participating students attend an ROTC class, are registered in the class, receive a grade in the class that is reflected on their student transcript, and receive credit for having taken the class, but are not formally enrolled in the ROTC program.

(2) **Cadets and Midshipmen.** Cadets and midshipmen are participating students that have formally enrolled with a Military Service as members of the ROTC program. There are three types of cadets and midshipmen:

(a) **Non-Contract Cadets and Midshipmen.** Non-contract cadets and midshipmen are allowed to wear a Service uniform, attend physical training events, attend basic program summer training, and participate in local exercises and other miscellaneous training events. They have not signed a military contract and have no obligation for active or Reserve duty service.

(b) **Contract Cadets and Midshipmen.** Contract cadets and midshipmen have signed a contract with a Military Service, incurring a military service obligation or an obligation to reimburse the United States for educational costs. They are allowed to wear a Service uniform, attend physical training events, participate in local exercises and other miscellaneous training events, attend basic program summer training, attend advanced training and, if offered a commission, will be commissioned as an officer in the Military Service concerned on completion of the program.

(c) **Foreign Student Program Cadets and Midshipmen.** In accordance with Sections 2111b and 2103 of Title 10, U.S.C., foreign student program cadets and midshipmen are allowed to wear a Service uniform, attend physical training events, participate in local exercises and other miscellaneous training events, attend basic program summer training, and attend advanced training. They do not sign a contract with a Military Service, do not incur an active duty service obligation (ADSO), and cannot be commissioned as an officer in any of the Military Services. Participation does not constitute any form of Military Service.

c. Student Eligibility for ROTC Enrollment

(1) **General.** Undergraduate students will not be denied the opportunity to enroll in ROTC solely based on their major courses of study. However, the Secretary of the Military Department concerned may use the major course of study as a criterion when allocating scholarships or awarding quotas in the advanced course.

(2) **Basic Course.** The ROTC Program basic course consists of the classes, training, and activities required of cadets and midshipmen in their first and second years of study. To be eligible for enrollment in the basic course, students must attend ROTC classes and participate in ROTC activities at either an institution with a host unit, extension unit, or cross-town unit.

(3) **Advanced Course.** The ROTC Program advanced course consists of classes, training, and activities required of cadets and midshipmen in their third and fourth year of study. In accordance with Section 2104 of Title 10, U.S.C., to be eligible for enrollment in the advanced course, a student must:

- (a) Meet the eligibility criteria for the basic course.
- (b) Be a citizen of the United States, unless the person is a foreign student enrolled in accordance with Section 2103 of Title 10, U.S.C. and Section 3.6 of this issuance.
- (c) Be selected under procedures prescribed by the Secretary of the Military Department concerned.
- (d) With the exception of foreign students described in Section 3.2.3(3)(b) of this issuance, enter into a written contract in which the student agrees to:

1. Complete the education and training requirements specified in the agreement.
2. Accept an appointment, if offered, as a commissioned officer.
3. Serve in the Military Services for the period specified in the agreement.
4. Other terms and conditions as the Secretary of the Military Department concerned may prescribe to protect the interests of the United States.

(e) With the exception of foreign students described in Paragraph 3.2.3(3)(b) of this issuance, execute the oath or affirmation in Paragraph 3.7.

(f) Either:

1. Successfully complete the basic course, or successfully complete the field training or practice cruise prescribed by the Secretary of the Military Department concerned.

2. At the discretion of the Secretary of the Military Department concerned, agree in writing to complete field training or a practice cruise, as prescribed by that Secretary, within 2 years after admission to the advanced course.

d. Eligibility for Extended Financial Assistance and Subsistence Allowance Payment.

In accordance with Section 2107(c)(1) of Title 10, U.S.C., extension of financial assistance and subsistence allowance payments may be approved for students enrolled in baccalaureate degree programs that require a fifth academic year or a combination of a part of a fifth academic year and summer sessions.

(1) The Secretary of the Military Department concerned will determine which baccalaureate degree programs will be approved for extended entitlements. The Secretary concerned will consider, but not be limited to, the following factors when making this determination:

(a) The average length of enrollment required by all students to complete a specified program at a specified institution.

(b) The amount of effective credit granted ROTC courses toward degree requirements in a specified program at a specified institution.

(c) Validated personnel requirements for accessing graduates with specified degrees.

(2) Extended entitlements may be approved:

(a) For courses required for completion of the baccalaureate degree for approved programs, including elective requirements of the ROTC program.

(b) On a case-by-case basis for non-scholarship students admitted to the advanced program and for students with 4-year scholarships in progress.

(3) Extended entitlements will not be approved for:

(a) The purpose of requiring extra courses for particular warfare skills or military career specialties.

(b) Students who require extra course work because of academic deficiency or failure.

(c) Creation of a 5-year scholarship as such, except in the unusual circumstances whereby an institution prescribes a 5-year baccalaureate degree requirement for a specific program.

(4) The Secretary of the Military Department concerned will ensure that students who accept extended scholarship entitlements execute amended contracts that extend their active service commitment for a period of time equivalent to the length of the entitlement extension.

e. Hazing. The practice of hazing is prohibited in all ROTC programs and will not be tolerated. Cadets and midshipmen must treat all people, at all times, with dignity and respect. Failure to do so may result in the individual being disciplined or involuntarily disenrolled from their ROTC unit. A cadet or midshipman disenrolled from an ROTC unit for hazing may not subsequently participate in any of the Military Services' officer commissioning programs.

f. Disenrollment Procedures. When contract cadets or midshipmen become subject to disenrollment, the officer commanding the ROTC unit will appoint a board of officers, or an investigating officer, to review and investigate the circumstances associated with the basis for such action; cadets and midshipman being considered for disenrollment will be provided reasonable notice and opportunity to prepare a response to any proposed disenrollment. At least one official of the institution (e.g., an administrator or faculty member designated by the institution) will be permitted to observe any hearings that may arise from the investigation. A cadet or midshipman being considered for disenrollment has the right to appear personally before the board or the officer conducting the investigation.

(1) The requirement for appointment of a board of officers or investigating officers is waived if the cadet or midshipman subject to disenrollment action voluntarily waives, in writing, his or her right to such review within 10 days of notification of pending disenrollment. When a medical disqualification, determined by the appropriate medical authority, forms the basis for disenrollment action, no board of officers, investigating officer or waiver of rights to such a review is required; however, the cadet or midshipman subject to disenrollment due to medical disqualification will be provided reasonable notice and the opportunity to prepare a response to the proposed disenrollment. When a written request from a cadet or midshipman to discontinue participation in the program forms the basis for the disenrollment action no board of officers, investigating officer or waiver of rights is required.

(2) At the discretion of the Secretary of the Military Department concerned, disenrolled cadets and midshipmen may be ordered to active enlisted service. If not ordered to active enlisted service, disenrolled cadets and midshipmen may be required to reimburse the cost of educational assistance, as specified in their agreements, unless the Secretary of the Military Department concerned waives the reimbursement pursuant to Paragraph 3.2.f.(3) of this issuance.

The Secretary of the Military Department concerned may remit or cancel any part of the indebtedness owed by a disenrolled cadet or midshipman to the United States.

(3) The Secretary of the Military Department concerned may consider medical disqualification, humanitarian reasons, needs of the Military Service, and other mitigating circumstances, in determining whether or not to require active enlisted service or to waive reimbursement for disenrolled cadets or midshipmen. Such considerations will be developed and documented carefully in the report of the board or investigating officer, or in the report and recommendations of the officer commanding the ROTC unit in cases where a report of a board of investigating officer is not prepared, and in the final action by the Secretary of the Military Department concerned. The final decision regarding whether to waive active enlisted service or reimbursement will be made by the Secretary of the Military Department concerned after careful review of the circumstances to determine that such a decision is consistent with existing statutory requirements, personnel policies or management objectives, equity and good conscience, and the best interest of the United States.

g. Ordering Disenrolled ROTC Cadets and Midshipmen to Active Enlisted Service.

The Military Department will delay ordering cadets and midshipmen who have breached their contracts to active enlisted service until they complete their normal undergraduate degree requirements projected at the time of disenrollment from ROTC, or are disenrolled from the institution they are attending, whichever occurs first.

(1) Cadets and midshipmen in graduate school may not be ordered to active duty until they complete the academic year in which they are enrolled or are disenrolled from the institution they are attending, whichever occurs first.

(2) Contract cadets and midshipmen who complete their degree requirements but refuse to accept their commission will be required to serve for not more than 4 years as enlisted personnel in accordance with Section 2107 of Title 10, U.S.C.

(3) Contract cadets and midshipmen who were active duty enlisted personnel when selected for ROTC scholarship, and who were separated early for the purpose of accepting the scholarship, will normally be ordered to active duty at the end of the term of the institution they were attending at the time in which they were disenrolled from the ROTC program. Their service commitment will be determined as follows:

(a) If freshman members of the program in the basic course of the Army or Air Force are disenrolled, their service commitment will be equivalent to the time not served on their original enlistment contract when they were separated to accept an ROTC scholarship. If freshman members in the basic course of the Navy or Marine Corps (i.e., members of the Navy or Marine Corps Reserve) are disenrolled, all service as midshipmen is counted as service under the enlistment or period of obligated service in accordance with Section 516 of Title 10, U.S.C. Those students with less than 1 year remaining may be required to reimburse the cost of educational assistance and be discharged from Reserve component.

(b) If contract cadets or midshipmen are disenrolled (i.e., they were not freshman members in the basic course at the time of disenrollment), their service commitment will be determined in accordance with their individual Service contract.

h. Uniform Wear. The Military Department concerned will prescribe the specific standards for uniform wear for cadets and midshipmen.

i. Amount of Drill. The Military Department concerned will prescribe the specific standards of performance cadets and midshipmen should achieve during drill. The professors of Military Science, Naval Science, and Aerospace Studies will prescribe the specific amount of drills required to reach this standard.

j. Institutional Standing Committees on ROTC. The Military Departments will cooperate with standing committees on ROTC at educational institutions for the purpose of mutually developing a program of instruction consistent with the goals of both parties. When the institution proposes changes that are inconsistent with law or military policies, the Military Departments will reject these proposals.

k. Course Substitution. The Military Departments may use institutionally taught courses, or courses taught jointly by civilian and military faculties, when these courses satisfy the objective contained in the ROTC curriculum and exist at, or can be developed by, the educational institution. Guest lecturers may provide specific hours of instruction in areas where they are qualified academically, provided the institution approves of this practice. This provision may not be used to reduce the required minimum military contact hours as specified by the Military Departments.

l. Payments and Benefits Offered by Educational Institutions. ROTC staff may accept only the following payments or benefits from an institution:

(1) Reasonable compensation or other benefits for services that are rendered to the institution by military staff of the ROTC unit during their non-duty hours may be accepted. Examples of such services include serving as a coach for an athletic team, a parking lot attendant, an assistant military property custodian, or other duties at a recognized Senior Military Colleges in accordance with Section 2111a of Title 10, U.S.C. However, such compensation or other benefits may only be accepted when the services performed are not part of the staff's regularly assigned military duties; do not interfere with the full and effective performance of his or her official military duties; do not bring discredit on the U.S. Government; and, do not interfere with the customary or regular employment of local civilians in their art, trade, or profession. Duty hours for ROTC staff may not vary from the duty hours of the unit simply to permit them to qualify for compensation for services rendered to an institution during the duty hours of the ROTC unit.

(2) Housing, if reasonable rent has been paid. If housing is accepted by ROTC staff from an institution at other than a reasonable rate of rent, such as, for example, free of charge, the housing will be considered as furnished on behalf of the United States and the individual may not be entitled to a basic allowance for housing.

(3) Reimbursement by the institution for expenses incurred by the ROTC staff for services that the staff performed at the request of the institution that are clearly beyond the scope of the individual's regularly assigned military duties. Itemized bills for these expenses will be presented to the institution. When possible, arrangements will be made for the institution to be billed directly for these expenses. Under no circumstances may a commuted or fixed allowance be accepted from the institution for the purpose of meeting such expenses.

(4) If offered on the same basis to civilian staff or faculty of the institution, enrollment in courses by the ROTC staff or any of their immediate family; tickets to institution or institution-sponsored activities; books and other supplies and materials from the institution's book store; and library privileges at a reduced rate or without charge.

m. Parking Reimbursement. The Secretary of the Military Department concerned may reimburse parking expenses in excess of \$25 per month, but not to exceed \$200 per month, in accordance with Chapter 1, Part C, Section U1220 of the Joint Travel Regulations.

3.3. ASSESSMENT OF ROTC UNITS. The Secretaries of the Military Departments will conduct an annual assessment of each one of their respective ROTC host units, including all data pertaining to their respective affiliates, to evaluate the efficiency and effectiveness of each individual unit and also to develop information by which to determine what will be considered the annual production necessary for 2- and 4-year programs to be considered viable for continued establishment within the Department. Assessments will be kept for audit purposes for a minimum of 5 years.

a. Annual assessment criteria will be:

(1) Determined by the Secretary of Military Department concerned.

(2) The same for every ROTC unit in a Military Department.

(3) Weighted and measured using quantitative regression analysis consistent with the requirements in Paragraph 3.3.b., and applied consistently to every ROTC unit in a Military Department.

(4) Listed in a memorandum provided to the presidents of each institution in a Military Department with ROTC units at least 6 months before the initial assessment, or 6 months before any subsequent assessments, if the criteria have changed since the prior assessment.

b. The Secretaries of the Military Department concerned may consider additional Service-specific measures as part of the annual assessment. The annual assessments will include the following assessment categories:

(1) Quality. The Military Departments will use one or more of the following standards to establish quality measures: standardized national test scores (i.e., Standardized Aptitude Test or American College Test) or Service-equivalent test scores (e.g., Air Force Officer Qualifying Test); commissioning rates (ratio of signed versus completed scholarships) or other production standards as determined by the Secretary of the Military Department concerned; ROTC student

rank compared to the university student body at large; academic rankings of the institution or degree programs; percent or number of specialized degrees awarded (e.g., Science, Technology, Engineering, and Math degrees); and, university compliance with applicable contracts, Service-specific regulations, and statutes.

(2) Demography. The Military Departments will use one or more of the following standards to establish the demographic make-up of the institution, the ROTC program's participants, or both:

- (a). Student diversity.
- (b). Institutional geography (i.e., market size, competition, State representation, and distance between units).
- (c). Whether it is a private or public institutions, the academic disciplines offered, and the percent of graduates with degrees from categories that the Military Service determines are difficult to achieve (e.g., technical academic majors).
- (d). Other attributes as determined by the Secretary of the Military Department concerned (e.g., historically black colleges and universities, other minority serving institutions, Ivy League member institutions or technical colleges and universities, or colleges and universities with significant military heritage).

(3) Resources. The Military Departments will use one or more of the following standards to establish resource measures: operational and maintenance costs of the unit; facility investments and improvements; the average cost per officer produced; Service-specific production or end strength constraints; administrative and personnel costs compared to production rates; staffing constraints; administrative and morale support provided by the college or university; and, compliance with applicable statutory authorities.

c. The Military Department's assessment of each individual ROTC host units will be signed by a general or flag officer and sent to the respective institution president and will be postmarked by June 15 of each year.

d. The Military Departments will forward a summary of their annual assessments to the Office of the USD(P&R) by August 15 of each year. At a minimum, this summary will include:

- (1) A list of the specific criteria assessed to include quality, demographic, and resource measures, as well as any other measures determined by the Secretary of the Military Department concerned, and how each criteria were weighted when executing the assessment.
- (2) A consolidated listing of all host institutions based on the assessment criteria applied.
- (3) A list of units identified for possible disestablishment, to include copies of the individual assessments sent to the institution presidents at those units.
- (4) Any trends or areas of concern noted.

3.4. DISESTABLISHMENT OF ROTC UNITS.

a. The decision to disestablish an ROTC host unit falls within the prerogative of the Secretary of the Military Department concerned and will be informed primarily by that Department's annual assessment of its ROTC host and extension units. Additionally, an institution and a Military Department may mutually agree to disestablish a unit if it is in the best interest of both entities. All decisions will be based on need for the most efficient allocation of limited resources to meet the specific needs of the Military Department concerned. The Military Departments will establish policies and procedures to notify institutions that are not meeting officer production standards or following other applicable requirements. Such notice will include a timeline for corrective action, and the timelines and procedures that will be followed to disestablish the unit if the institution fails to take corrective action in accordance with Military Department policy. Institutions impacted will be provided an opportunity to respond to the notice and the findings of assessments upon which the notice is based.

b. The Military Departments will coordinate with the Office of the USD(P&R) and the other Military Departments before initiating disestablishment procedures.

c. Before disestablishing a host unit, the Military Department concerned will consider whether the DoD will have any remaining ROTC units in that State. The Military Department will not disestablish a host unit if there are no other ROTC units from any of the Military Departments remaining in that same state without approval from the Secretary of Defense.

d. Institutions with host units approved for disestablishment will be notified at least one full academic year before the actual closure of the ROTC unit.

e. Host units approved for disestablishment will be phased out with enough time to permit enrolled cadets and midshipmen to complete the program or offer them a practical alternative for obtaining commissions.

(1) The Military Departments will work to accommodate the unit's cadets or midshipmen, where possible. This may include, but is not limited to:

(a) Helping cadets or midshipmen who wish to transfer to other units or institutions.

(b) Offering students a slot in an officer training institution or officer candidate institution after graduation.

(2) Cadets and midshipmen who have completed not more than 2 years in the ROTC program that wish to remain at the same institution despite the unit closure, but who would still like to pursue a commission in a Military Service, will have the opportunity to apply for a transfer to another Service's ROTC unit at that institution, if applicable.

(a) Cadets and midshipmen must have a written recommendation from the Professor of Military Science, Naval Science, or Aerospace Studies of the unit being disestablished.

(b) Enrollment in another Military Department's ROTC program is not guaranteed. However, it will be an additional, favorable factor for other Military Departments to consider when reviewing an individual's application for enrollment.

(c) The disposition of all agreements, scholarships, contracts, or obligations between the cadet or midshipman and the losing Military Department must be resolved before the transfer and will not apply to the gaining Department.

3.5. ROTC SCHOLARSHIP PROGRAM.

a. The minimum age for award of an ROTC scholarship is 17 years, in accordance with Section 505 of Title 10, U.S.C.

b. Pursuant to Section 2005 of Title 10, U.S.C., the Secretary of the Military Department concerned will require, as a condition of providing an ROTC scholarship to any recipient, that he or she enters into a written contract in which the recipient agrees to:

(1) Complete the educational requirements specified in the agreement.

(2) Accept an appointment as a commissioned officer in accordance with Section 2107 or 2107a of Title 10, U.S.C.

(3) Serve on Active or Reserve Component for the period specified in the agreement, and complete the Service obligation specified in Section 2107 or 2107a of Title 10, U.S.C.

(4) Reimburse the United States in an amount that bears the same ratio to the total cost of education provided to that student as the unserved portion of active duty bears to the total period of active duty the cadet or midshipman agreed to serve if he or she voluntarily, or because of misconduct, fails to complete the period of active duty specified in the agreement or fails to fulfill any term or condition prescribed (Selected Reserve enlisted service will not be used as a substitute for active duty enlisted service or reimbursement).

(5) Such other terms and conditions as the Secretary of the Military Department concerned may prescribe to protect the interests of the United States.

c. The Secretary of the Military Department concerned will:

(1) Determine the period of active service served by the ROTC scholarship recipient, to include an additional obligation equivalent to any scholarship entitlements extended beyond 4 years.

(2) Prescribe the conditions for repayment of a cadet or midshipman's outstanding reimbursement obligation so that the interest rate (if applicable), the monthly repayment, term, and method of payment reasonably replicate the repayment schedule of the Guaranteed Student Loan sponsored by the U.S. Department of Education.

(3) Establish procedures for proper accounting and timely collection of debt repayment funds due to the U.S. Treasury on behalf of the Military Department concerned.

d. An obligation to reimburse the United States is a debt owed the United States. A discharge in bankruptcy pursuant to Chapters 1 through 13 of Title 11, U.S.C., does not release a person from such debt if the final decree of the discharge in bankruptcy was issued within 5 years after the last day of a period during which such person had agreed to serve on active duty.

3.6. ELIGIBILITY FOR ENROLLMENT IN SENIOR ROTC BY FOREIGN NATIONALS.

a. Pursuant to Sections 2103, 2104, 2111b, and 12201 of Title 10, U.S.C., the Secretaries of the Military Departments are responsible for approving enrollment of persons from foreign countries and their participation in the Senior ROTC program under criteria approved by the Secretary of State. Care will be exercised to avoid active recruitment of foreign students.

(1) Students enrolled under Sections 2103 or 2111b of Title 10, U.S.C.:

(a) Must be from a country on the approved country list that is developed in coordination with the Office of the Under Secretary of Defense for Policy and the Department of State and published annually.

(b) Must be sponsored by their country of origin. Sponsorship requires a signed agreement between the student's country of origin and the Secretary of the Military Department concerned. This agreement may include:

1. The provision that the student's country of origin will reimburse the United States for any costs stipulated by the Secretary of the Military Department concerned. Examples of such costs include, but are not limited to, any associated training, uniforms, pay, and allowances.

2. Any other provisions the Secretary of the Military Department concerned deems necessary. These provisions may include, but are not limited to, a requirement that the student must owe a national military service obligation to their home country on graduation.

(c) Will receive the same training, uniforms, and equipment as U.S. students and are subject to the same rules and regulations.

(d) May enroll in the program for advanced training at the discretion of the Secretary of the Military Department concerned, pursuant to Section 2104 of Title 10, U.S.C.

(e) Are not eligible for scholarships, in accordance with Section 2107 of Title 10, U.S.C.

(f) May be disenrolled from the program when the Secretary of the Military Department concerned determines that the interest of the Department requires such action.

(g) Will not be assessed against the Senior ROTC program enrollment levels, but will be reported.

(h) Are not considered to be serving in any status in any of the U.S. Military Services.

(i) Will be notified that participation in and completion of the Senior ROTC program will not result in their appointment as a regular officer in any of the Military Services.

(2) Students who are enrolled under Section 2103b of Title 10, U.S.C. may be appointed:

(a) As active officers, pursuant to Section 531 of Title 10, U.S.C., if they receive citizenship while enrolled.

(b) As Reserve officers, pursuant to Section 12201 of Title 10, U.S.C., if they have been lawfully admitted to the United States for permanent residence pursuant to Chapter 12 of Title 8, U.S.C.

(c) Satisfactorily complete the Senior ROTC program as prescribed by the Military Department concerned.

(d) Receive a baccalaureate degree.

(e) Are not limited in assignments (e.g., Section 6019 of Title 10, U.S.C., precludes the assignment of non-citizens to duty as officers aboard U.S. vessels).

(f) Are otherwise qualified as prescribed in regulations issued by the Military Department and Military Service concerned.

(3) Foreign students who do not qualify under this section for enrollment as an ROTC student may register with the university as an auditing or a participating student in classroom instruction. These foreign students may attend classroom instruction but may not wear the uniform or participate in field exercises.

b. Military Departments with foreign persons enrolled in ROTC will forward a list of these persons to the Office of the USD(P&R) by December 1 each year. At a minimum, this list will include the student's:

(1) Name.

(2) Country of origin.

(3) ROTC unit.

(4) Institution, if different than the institution at which the ROTC unit is located.

(5) Projected year of program completion or graduation.

c. Foreign students who become naturalized citizens of the United States before entering the advanced ROTC program, and are otherwise qualified, may be enrolled in the appropriate course pursuant to Section 2104 of Title 10, U.S.C., or be released from the advanced ROTC program.

d. Foreign ROTC students may be provided appropriate uniform clothing, or the civilian educational institution concerned may be provided ROTC commutation funds in lieu of issue-in-kind uniforms. Foreign ROTC students will return uniform clothing to the responsible Military Service or civilian educational institution on completion of or withdrawal from the Senior ROTC program.

e. The Secretaries of the Military Departments will prescribe regulations requiring the non-disclosure of classified information to a foreign ROTC student receiving instruction in accordance with this section. Such regulations will be in addition to regulations that apply to other cadets and midshipmen from the United States.

3.7. OATHS AND SECURITY REQUIREMENTS.

a. Required Oath

(1) Each applicant for formal enrollment in the advanced course, or financial assistance programs in Senior ROTC, will execute the following oath or affirmation: “I do solemnly swear (or affirm) that I will support and defend the Constitution of the United States against all enemies, foreign and domestic; that I will bear true faith and allegiance to the same; that I take this obligation freely, without any mental reservation or purpose of evasion; and that I will well and faithfully discharge the duties of the office on which I am about to enter. [*Optional: So help me God.*]”

(2) Foreign students enrolled in ROTC pursuant to Sections 2103 and 2111b of Title 10, U.S.C., and Paragraph 3.6 of this issuance are not required to take, and will not be asked to take, the oath.

b. Loyalty and Security Requirements. Each applicant for enrollment in any of the scholarship or financial assistance programs of the Military Departments and each applicant for enrollment in the Senior ROTC advanced course must satisfy the loyalty and security requirements for enlistment in the Reserve Component of the appropriate Military Service.

3.8. CONDUCT OF MILITARY TRAINING. Field training or practice cruises are prescribed by Sections 2104 and 2109 of Title 10, U.S.C. and must be completed successfully by program members as a prerequisite to commissioning. The Secretary of the Military Department concerned may authorize additional practical military training and resultant expenditures as considered necessary to ensure successful participation in the commissioning program.

3.9. UNIFORMS AND COMMUTATION IN LIEU OF ISSUE-IN-KIND UNIFORMS.

a. Cadet and midshipman uniform issue will be at the discretion of the Secretary of the Military Department concerned. The Secretary will prescribe the standard uniform items appropriate for cadets or midshipmen enrolled in ROTC at the basic and advanced levels.

b. Commutation in lieu of issue-in-kind uniforms is payment made by the Military Departments instead of the issue of uniforms, provided in accordance with Section 2110 of Title 10, U.S.C. Commutation in lieu of issue-in-kind uniforms for ROTC students enrolled at military colleges (i.e., colleges and universities maintaining a corps of cadets) is reimbursement made to cadets and midshipmen for uniforms based on the requirement to wear uniforms daily throughout the institution year. This reimbursement will be based on the actual 4-year cost of the uniform issuance at each military college, but will not exceed an amount equal to three times the value of a basic or advanced cadet or midshipman uniform issue at non-military institutions based on approved Service military clothing issue item prices as published annually by the Defense Logistics Agency.

(1) Commutation rates for military colleges will be determined based on approved Service military clothing issue items. Cadets and midshipmen enrolled in ROTC for purposes of obtaining a commission as an officer will be reimbursed based on a comprehensive issue of uniform items for either basic or advanced ROTC. Uniform issue will consider dress, duty (e.g., daily, seasonal), and athletic uniforms, including insignia, outer garments and accessories, plus a consideration, not to exceed \$100.00 per cadet or midshipman, for alterations and maintenance.

(2) By May 31 each year, the Secretary of the Military Department concerned will give the estimated rates of commutation for basic and advanced ROTC programs to the Office of the USD(P&R). The Office of the USD(P&R) will determine and notify the Military Services of the approved rates that will serve as a maximum rate for the year.

(3) At the discretion of the Military Department concerned, payment will be made to cadets and midshipmen on an annual basis, spread over the cadet's or midshipman's period of study in the Senior ROTC program. For 4-year institutions, payment will be spread evenly, 25 percent per year. For 2-year institutions, payment will be spread, 66 percent for the first year and 34 percent for the second year of study. Uniforms issued under commutation remain the property of the cadets and midshipmen. Payment of commutation funds may be made after an initial probationary period of enrollment. During the probationary period, basic course cadets and midshipmen will, at a minimum, be required to:

- (a) Sign a statement of understanding that outlines the probationary period requirements.
- (b) Provide a completed enrollment form.
- (c) Successfully complete an enrollment screening interview.
- (d) Successfully pass the Physical Fitness Test.

3.10. MEDICAL EXAMINATION.

a. Thorough and complete medical examinations, in accordance with DoD Instruction 6130.03, will be conducted before enrollment in the scholarship program or at the time of, or immediately before, enrollment in the advanced courses of a Military Department ROTC program. Following medical qualification, these contracted cadets and midshipmen will maintain health and physical standards in accordance with DoD Instruction 6130.03 while in the scholarship program and in contract status. Non-contract cadets and midshipmen are encouraged to maintain the same health and physical standards if they intend to compete for a scholarship or secure a contract towards commissioning, but this is not mandatory.

b. Such medical examinations will, in all respects, be equivalent to the examination conducted to determine medical qualifications for appointment as a commissioned officer.

c. Once medically qualified, if a cadet or midshipman is temporarily medically disqualified due to a non-permanent medical condition he or she may participate in a non-enrolled status with the approval of the Military Department concerned. If such persons subsequently become medically qualified while participating, the Military Department concerned may offer participation credit for courses previously completed.

d. All military medical treatment facilities will provide initial exams, specialty consults, medical tests, or any other commissioning evaluations to all accession applicants designated by the Department of Defense Medical Examination Review Board. A medical treatment facility will not be required to provide service for a capability it does not possess. The particular Service affiliation of the applicant will have no bearing on the selection of the medical treatment facility at which the applicant will be seen. The fact that these applicants may not have any association with the DoD or may not be enrolled in the Defense Enrollment Eligibility Reporting System will not preclude them from being seen at a medical treatment facility. Applicant exams, consults, tests, and other commissioning evaluations will be treated as mission-related priorities with the scheduling precedence associated with active duty Service members.

3.11. MEDICAL LEAVE OF ABSENCE (MLOA).

a. The decision to place a cadet or midshipman on an MLOA will be made by the Secretary of the Military Department concerned.

b. The suspension of payment of the scholarship and stipend benefits of a cadet or midshipman during a period of health-related incapacity may only be done in accordance with the policy prescribed in this instruction. Specifically, the medical status and record of each cadet or midshipman who is being considered for an involuntary MLOA will be independently evaluated by an authorized military or civilian physician to evaluate the health-related incapacity or condition.

(1) The purpose of the medical record review is to determine whether the health-related incapacity or condition presents clear evidence that, following medical treatment, the cadet or midshipman will be unable to meet the physical standards for appointment into the Military Services within a reasonable period of time.

(2) Pertinent considerations that should be determined by military or civilian medical reviewers, in consultation with Professors of Military Science, Naval Science, or Aerospace Studies in the cadet or midshipman's chain of command, include whether the medical condition or physical defect would require excessive time lost from duty, result in a prolonged inability to attend classes, or preclude sufficient academic progress towards a degree.

c. The cadet or midshipman will receive written notification of the intent to recommend suspension of scholarship and stipend benefits under an MLOA, and the basis for that determination.

d. The cadet or midshipman will be provided sufficient time, but not less than 30 days, if requested, to submit relevant written information for consideration by the medical reviewer, and the Secretary of the Military Department concerned, before having scholarship and stipend benefits suspended.

e. If the medical review recommends that the cadet or midshipman, under the foregoing standards and procedures, should be placed on an MLOA, the Secretary of the Military Department concerned will review the record, including the recommendation of the applicable Professor of Military Science, Naval Science, or Aerospace Studies, and make a final determination.

(1) The MLOA will not be implemented until the record review has been completed by the Secretary of the Military Department concerned and a determination made.

(2) If approved the MLOA will remain in effect until such time as determined by an authorized physician, in consultation with the Professor of Military Science, Naval Science, or Aerospace Studies, that the health-related incapacity no longer exists or the cadet or midshipman is able to participate in ROTC activities and demonstrates the potential to meet the physical standards and other requirements to be qualified to receive an appointment as a commissioned officer. Procedures and criteria will be established to allow reimbursement of suspended scholarship benefits in cases in which cadets or midshipmen are removed from the MLOA.

f. A cadet or midshipman will be notified in writing that his or her scholarship and stipend benefits will be suspended under MLOA procedures along with an explanation of the reasons for the suspension, the conditions under which the scholarship and monthly benefits may be restored, and information about how to submit an appeal to the Secretary of the Military Department concerned.

3.12. MEDICAL BENEFITS.

a. Pursuant to Section 1074b of Title 10, U.S.C., cadets and midshipmen, and designated applicants for membership into an ROTC program, will receive medical and dental care as outlined in this section.

b. Subject to the other requirements of this section, a cadet, midshipman, or designated applicant eligible for benefits pursuant to this section, for an injury, illness, or disease is entitled to:

(1) The medical and dental care authorized pursuant to Chapter 55 of Title 10, U.S.C., that is appropriate for the treatment of the injury, illness, or disease until the injury, illness, disease, or any resulting disability that cannot be materially improved by further hospitalization or treatment.

(2) Meals during hospitalization.

c. A cadet, midshipman, or designated applicant is entitled to the benefits described in Paragraph 3.12.b. of this issuance, who incurs or aggravates an injury, illness, or disease:

(1) In the line of duty while performing duties pursuant to Section 2109 of Title 10, U.S.C.

(2) While traveling directly to or from the place at which the duties in Section 2109 of Title 10, U.S.C., were performed or were to be performed.

(3) In the line of duty while remaining overnight immediately before performing duties pursuant to Section 2109 of Title 10, U.S.C., or, while remaining overnight between successive periods of performing such duties at or in the vicinity of the site of the duties performed, if the duty site is outside reasonable commuting distance from the residence of the cadet, midshipman, or designated applicant.

d. A cadet, midshipman, or designated applicant is not entitled to benefits in accordance with Paragraph 3.12.b. of this issuance for an injury, illness, or disease, or the aggravation of an injury, illness or disease, that is not incurred in the line of duty, as determined by the Military Department concerned.

3.13. TRANSFER REQUESTS FROM ACADEMY CADETS AND MISHIPMEN. U.S. cadets or midshipmen from a Military Service Academy who resign or are disenrolled for violation of the Academies' dependency policies may request transfer to an ROTC program. The DD Form 785, "Record of Disenrollment from Officer Candidate-Type Training," should be included in the request. Approval and method of transfer is at the discretion of the Secretary of the Military Department concerned.

3.14. COMMISSIONING, ASSIGNMENT OF GRADUATES, AND RELEASE.

a. On the successful completion of the required course of instruction, a graduate of a program referred to in this instruction, if otherwise qualified, may be appointed a commissioned officer in the appropriate Military Service.

b. Graduates will receive duty orders (e.g., active or Reserve) for training as soon as possible, within a 12-month period, following their appointment as commissioned officers.

c. Graduates who have fulfilled their active military training and service obligation, or have performed a minimum of 6 months of active duty or active duty for training and have enlisted

Reserve status, following their appointment as commissioned officers and in accordance with Service requirements, may be either:

(1) Ordered to active duty or active duty for training under conditions contained in agreements with the Military Departments; or

(2) Placed in appropriate Selected Reserve assignments when unit location and skill requirements are compatible with the residence of the assignee and with his or her military skill.

d. A graduate may be delayed from being ordered to active duty or active duty for training in accordance with Service-specific regulations if he or she:

(1) Is the recipient of a fellowship or scholarship;

(2) Has been accepted by a recognized institution of higher education for graduate studies;

(3) Would suffer undue personal hardship; or

(4) Is otherwise prevented from reporting as ordered for cogent and acceptable reasons. If delayed, the graduate will remain subject to the assignment criteria in Paragraphs 3.14.a. and 3.14.b. of this issuance and will be ordered to active duty or active duty for training, as appropriate, at such time as the cause of his or her delay ceases to exist.

e. Officers commissioned from the ROTC program will not be released from active duty to pursue a professional activity with the potential of public affairs or recruiting benefit to the DoD during the initial 2 years of active commissioned service. Exceptional personnel with unique talents and abilities may be authorized excess leave or be released from active duty and transferred to the selective Reserve after completing 2 years of active commissioned service when there is a strong expectation their professional activity will provide the DoD with significant favorable media exposure likely to enhance national recruiting or public affairs. The Secretaries of the Military Departments will seek a waiver from ASD(M&RA) to release a cadet or midshipman prior to the completion of 2 years of active service.

(1) **Initial Assignments.** ROTC commissioned officers' initial assignments will support normal respective Service career progression. No Military Service will make unique or special arrangements for ROTC graduates during initial assignments that are typically unavailable to other Service members and that provide or give the perception of providing a distinct advantage in pursuit of a career in a professional activity other than the military.

(2) **Approval Authority and Processing Requirements.** Secretaries of the Military Departments will establish the approval authority and specific processing requirements for all requests for excess leave and early release from active duty.

(3) **Excess Leave.** After serving a minimum of 24 months of the current obligated active duty period, officers may apply for excess leave, for a period not to exceed 1 year, to pursue a professional activity with potential recruiting or public affairs benefits to the DoD. The agreement between the individual and the professional team or organization must reflect the

intent of both parties to employ the individual in a way that brings credit to the DoD. Personnel are not entitled to pay and allowances while in excess leave status, nor are they entitled to receive disability retired pay if they incur a physical disability while in excess leave status. Officers must:

- (a) Remain subject to recall to active duty.
- (b) Be in good standing, to include meeting all physical fitness requirements and standards.
- (c) Have secured an actual contract or binding commitment with a professional team or organization guaranteeing the opportunity to pursue an activity with potential recruiting benefits as described.
- (d) Acknowledge that time served in excess leave will not be used to satisfy an existing ADSO.

(4) **Early Release.** Officers may request early release from their ADSO for the purpose of pursuing a professional activity with potential recruiting or public affairs benefits for the DoD. The agreement between the individual and the professional team or organization must reflect the intent of both parties to employ the individual in a way that brings credit to the DoD. Military Departments will notify the ASD(M&RA) when an officer is released early from active duty in accordance with this program. In addition to any further requirements as determined appropriate by the Secretary of the Military Department concerned, applicants for early release must, at a minimum:

- (a) Have served 24 months of the original ADSO.
- (b) Be in good standing, to include meeting all physical fitness requirements and standards.
- (c) Have secured an actual contract or binding commitment with a professional team or organization guaranteeing the opportunity to pursue an activity with potential recruiting benefits as described.
- (d) Be assigned to a Selected Reserve unit and meet normal retention requirements based on minimum participation standards in accordance with Section 10147 of Title 10, U.S.C., and be subject to immediate involuntary recall for any reason to complete the period of active duty from which early release was granted.
- (e) Acknowledge that the officer is subject to monetary repayment of educational benefits at a prorated share based on the period of unfulfilled ADSO, and that such recoupment is in addition to the two-for-one Selected Reserve obligation required in Paragraph 3.14.e.(3)(f) of this issuance. Officers subject to recoupment pursuant to Section 2005 of Title 10, U.S.C., for receipt of advanced education assistance must reimburse the United States a pro-rata share of the cost of their advanced education assistance based on the period of unfulfilled active duty service.

(f) Agree that, in the event that the officer is no longer under a contract or binding agreement with a professional team or organization, the officer will either return to active duty to complete the remaining ADSO, or continue in the Selected Reserve for a period of not less than two times the length of their remaining ADSO, as determined by their Military Service.

3.15. ROTC RESOURCES SUMMARY REPORT. To support the planning, programming, and budgeting processor execution, Military Services will report annually to the Office of the USD(P&R), accurate, consistent, and complete resource information on an actual or estimated basis applicable to the Senior ROTC program using DD Form 2609, Reserve Officers' Training Corps Resources Summary Report accompanied by ROTC enrollment information using DD Form 2611, Reserve Officers' Training Enrollment Data. These forms are found on the DoD Forms Management Program website, <http://www.dtic.mil/whs/directives/forms/index.htm>. Information submitted, which must be consistent with current President's budget requests, will be considered the official costs, and will be the basis for responding to congressional as well as public inquiries.

a. Reported Resources. Resources to be reported are those funded under the following:

(1) Military personnel accounts (e.g., Service personnel, cadet and midshipman subsistence, travel, and uniforms).

(2) Operation and maintenance (O&M) funds for supplies, equipment, and facilities, to include items provided on a reimbursable or non-reimbursable basis by another organizational segment of the reporting Military Service.

(3) Procurement items (e.g., computers and systems).

b. Reporting and Record Keeping. Minimum reporting and record-keeping requirements for resources identified with ROTC programs are as follows:

(1) The Military Department will submit annually individual reports on the costs and budgets for their respective Senior ROTC programs. Although the Marine Corps does not have its own ROTC program, it will report those resources used in support of the Naval ROTC program.

(2) Reports developed will be consistent with data in the current President's Budget request as well as those amounts displayed in the Comptroller's O&M Report. All costs shown on the specified formats will be in current dollars for each FY addressed.

(a) Within 30 days after the President's Budget has been submitted to Congress (about February 20), the Military Services will annually submit data to cover:

1. The previous FY finished (actual) budget.
2. The current programmed FY budget.
3. The budgets for the two forthcoming FYs.

(b) The following two estimates will be provided for the current FY:

1. The current year's authorized request.

2. The Military Services' best current estimates consistent with costs submitted in the latest President's Budget.

(3) For DD Forms 2609 and 2611, fill in the applicable blanks identifying the active duty or Reserve Component supporting the ROTC program, date prepared, and FY reported.

(4) Projected or estimated inflation rates used in the computation of military pay, civilian pay, and the O&M will be those provided annually in the Defense budget materials of the Under Secretary of Defense (Comptroller)/Chief Financial Officer of the Department of Defense, available online at <http://www.defenselink.mil/comptroller>.

(5) Costs incurred in the conduct of multiple programs and consolidated under a single budget item will be separated for reporting on the applicable formats. For example, if multiple officer programs (e.g., ROTC, academies, officer candidate institutions, or the officer training institution) are accounted under one budget element (e.g., communications or automation), costs will be allocated or prorated among the programs and reported under the appropriate heading. A prorated or allocated cost will be shown with an asterisk denoting that the cost is an estimate rather than a specific amount for which records are maintained.

(6) Each Military Department, to include data for the Reserve Components, will submit only those formats for which manpower or funds have been committed to an ROTC program.

(7) If the total annual amount allocated to an individual cost category shown on the DD Form 2609 is less than \$500, it need not be reported under this requirement.

GLOSSARY

G.1. ACRONYMS.

ADSO	active duty service obligation
ASD(M&RA)	Assistant Secretary of Defense for Manpower and Reserve Affairs
FY	fiscal year
MLOA	medical leave of absence
O&M	operation and maintenance
ROTC	Reserve Officers' Training Corps
U.S.C.	United States Code
USD(P&R)	Under Secretary of Defense for Personnel and Readiness

G.2. DEFINITIONS.

academic year. The time period beginning the first day of the fall academic term and ending on the last day of the spring academic term.

ADSO. A commitment of active military service for a specified period of time.

advanced course. The portion of the ROTC program that consists of the classes, training, and activities required of cadets and midshipmen beyond their second year of study.

advanced training. The training and instruction offered in the Senior Reserve Officers' Training Corps to students enrolled in an advanced education program beyond the baccalaureate degree level or to students in the third and fourth years of a 4-year Senior Reserve Officers' Training Corps course, or the equivalent period of training in an approved 2-year Senior Reserve Officers' Training Corps course. An exception to this includes a student enrolled in an academic program who has been approved by the Secretary of the Military Department concerned and who requires more than 4 academic years for completion of baccalaureate degree requirements, including elective requirements of the Senior Reserve Officers' Training Corps course; as well as a student in a fifth academic year or a combination of a part of a fifth academic year and summer sessions.

auditing students. One of two types of ROTC students. Auditing students attend an ROTC class, subject to the approval of the instructor, but do not receive a grade in the class, do not receive credit for taking the class, and are not formally enrolled in the ROTC program and pursuant to the participating institution's policy, may or may not be registered in the class. See also "ROTC students" and "participating students."

basic course. The portion of the ROTC program that consists of the classes, training, and activities required of cadets and midshipmen in their first and second years of study.

cadets and midshipmen. Participating students that have formally enrolled with a Military Service as members of the ROTC program. There are three types of cadets and midshipmen: contract, non-contract, and foreign student program.

consortium. An arrangement that involves multiple ROTC host units sharing resources to maximize efficiency. These resources can include, but are not limited to, facilities, staff, organizational structure, processes, and administrative material. A consortium consists of two or more host units with their affiliated extension units and cross-town institutions. The term consortium describes the arrangement between host units and does not describe the units themselves.

contract cadets and midshipmen. One of three types of cadets and midshipmen, these members of the program have signed a contract with a Military Service, incurring an ADSO or an obligation to reimburse the United States for educational costs. They are allowed to wear a Service uniform, attend physical training events, participate in local exercises and other miscellaneous training events, attend basic program summer training, attend advanced training, and will be commissioned as an officer in one of the Military Services on completion of the program. (See also “cadets and midshipmen,” “non-contract cadets and midshipmen,” and “foreign student program cadets and midshipmen.”)

cross-town. The designation given an institution that has an agreement with both a host institution and with the ROTC headquarters of a Military Department that would allow its students to enroll in the ROTC program of the host unit. Cadets and midshipmen at this institution attend ROTC classes and activities on the campus of the host unit. There is no ROTC staff assigned to this institution.

disenrollment. The voluntary or involuntary termination of a cadet or midshipman from an ROTC program.

diversity. All the different characteristics and attributes of the DoD’s Total Force, which are consistent with our core values, integral to overall readiness and mission accomplishment, and reflective of the Nation we serve.

education. Any course or program of instruction in an institution of higher learning. Senior ROTC educational programs qualify cadets and midshipmen for commissioning and establish a basis for their future professional growth and performance in their Military Service. Senior ROTC programs provide cadets and midshipmen with:

An understanding of the fundamental concepts and principles of military, naval, and aerospace sciences.

A basic understanding of associated military professional knowledge.

A strong sense of personal integrity, honor, and individual responsibility.

An appreciation of the requirements for national security.

extension unit. An ROTC unit located at an institution that has an agreement with both a host ROTC unit and with the ROTC headquarters of a Military Department to maintain on its campus an ROTC presence extended from the host unit. Cadets and midshipmen at this institution attend ROTC classes and activities on their own campus. An extension unit is manned either full- or part-time with staff assigned from the host unit.

foreign student program cadets and midshipmen. One of three types of cadets and midshipmen, these members of the program are foreign students that are enrolled pursuant to Section 2103 and 2111 of Title 10, U.S.C., and Paragraph 3.6 of this issuance. They are allowed to wear a Service uniform, attend physical training events, participate in local exercises and other miscellaneous training events, attend basic program summer training, and attend advanced training. They do not sign a contract with a Military Service, do not incur an ADSO, and cannot be commissioned as an officer in any of the Military Services unless they meet the specific criteria listed in Paragraph 3.6.a.(10) of this issuance. (See also “cadets and midshipmen,” “contract cadets and midshipmen,” and “non-contract cadets and midshipmen.”)

hazing. In accordance with Deputy Secretary of Defense memorandum, “Hazing and Bullying Prevention and Response in the Armed Forces,” December 23, 2015, hazing is any conduct through which a military member or members, or a Department of Defense civilian employee or employees, without a proper military or other governmental purpose but with a nexus to military service or Department of Defense civilian employment, physically or psychologically injure or create a risk of physical or psychological injury to one or more military members, Department of Defense civilians, or any other persons for the purpose of: initiation into, admission into, affiliation with, change in status or position within, or as a condition for continued membership in any military or Department of Defense civilian organization. The Secretaries of the Military Departments may issue regulations prohibiting hazing and appropriate local guidelines.

host unit. An ROTC unit located at an institution that has an agreement with a Secretary of a Military Department to maintain an ROTC unit on its campus. Cadets and midshipmen at this institution attend ROTC classes and activities on their own campus. A host unit is manned full-time with staff assigned to that institution.

member of the program. A student who is formally enrolled in the Senior Reserve Officers’ Training Corps of a Military Service in accordance with Section 2101 of Title 10, U.S.C. A member of the program is a cadet or midshipmen and is in contrast to an “ROTC student” who may be taking ROTC courses but is not formally enrolled in the program.

MLOA. The involuntary suspension of the scholarship and stipend benefits paid to a cadet or midshipman due to a health-related incapacity or condition that presents clear evidence that a cadet or midshipmen, following medical treatment, will be unable to meet the physical standards for appointment into a Military Service or otherwise complete the requirements for commissioning within a reasonable period of time.

military colleges. Educational institutions that grant undergraduate degrees, organize students into a corps of cadets under military discipline, and require all members of the corps, including those enrolled in ROTC, to be in uniform and meet military standards when on campus.

military service obligation. The total required service that each person who becomes a Service member will serve in a Military Service unless discharged in accordance with regulations prescribed by the Secretary of Defense and the Secretary of the Military Department concerned.

military training. Includes field training and practice cruises prescribed by Section 2104 of Title 10, U.S.C.; or, other practical military training designed for the further instruction and leadership development of members of the program, which is in addition to field training and practice cruises, as prescribed and conducted by the Secretary of the Military Department concerned, pursuant to Section 2109 of Title 10, U.S.C.

non-contract cadets and midshipmen. One of three types of cadets and midshipmen, these members of the program are allowed to wear a Service uniform, attend physical training events, and participate in local exercises and other miscellaneous training events. (See also “cadets and midshipmen,” “contract cadets and midshipmen,” and “foreign student program cadets and midshipmen.”)

participating students. One of two types of ROTC students. They attend an ROTC class, are registered in the class, receive a grade in the class that is reflected on their student transcript, and receive credit for having taken the class, but are not formally enrolled in the ROTC program. (See also “ROTC students” and “auditing students.”)

ROTC students. Individuals that attend the ROTC program classes offered as part of the course of military instruction that has been adopted by the institution as part of its curriculum. ROTC students are not formally enrolled with a Military Service, in contrast to cadets and midshipmen who are formally enrolled. There are two types of ROTC students: auditing students and participating students.

ROTC unit. An organization of military personnel physically located at an educational institution whose mission is to execute the ROTC program.

REFERENCES

- Code of Federal Regulations, Title 32
- Defense budget materials of the Under Secretary of Defense (Comptroller)/Chief Financial Officer of the Department of Defense
- DoD Directive 5124.02, “Under Secretary of Defense for Personnel and Readiness (USD(P&R)),” June 23, 2008
- DoD Instruction 1010.01, “Military Personnel Drug Abuse Testing Program (MPDATP),” September 13, 2012
- DoD Instruction 1315.18, “Procedures for Military Personnel Assignments,” October 28, 2015
- DoD Instruction 6130.03, “Medical Standards for Appointment, Enlistment, or Induction in the Military Services,” April 28, 2010, as amended
- DoD Manual 8910.01, Volume 1, “DoD Information Collections Manual: Procedures for DoD Internal Information Collections,” June 30, 2014, as amended
- Joint Travel Regulations, “Uniformed Service Members and DoD Civilian Employees,” current edition¹
- Under Secretary of Defense (Comptroller)/Chief Financial Officer of the Department of Defense Report, “Office of the Secretary of Defense, Operation and Maintenance Overview,” current edition²
- Deputy Secretary of Defense Memorandum, “Hazing and Bullying Prevention and Response in the Armed Forces,” December 23, 2015.
- United States Code, Title 8
- United States Code, Title 10
- United States Code, Title 11
- United States Code, Title 37

¹ This document may be found at the Defense Travel Management Office webpage (<http://www.defensetravel.dod.mil>) under the Travel Regulations and Allowances target.

² This document may be found at the Defense Comptroller webpage (<http://www.comptroller.defense.gov>) under the Defense Budget target.