

## Individual Transition Plan (ITP)

Full Name: \_\_\_\_\_ Anticipated Transition Date: \_\_\_\_\_

Rank: \_\_\_\_\_ Unit: \_\_\_\_\_ Tier: \_\_\_\_\_

Date completed Initial Counseling: \_\_\_\_\_ Date attended Pre-Separation Counseling: \_\_\_\_\_

List Short Term Transition Goals:

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List Long Term Transition Goals:

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### TRANSITION PLANNING OVERVIEW

The key to a successful transition is planning, which requires a carefully thought out Individual Transition Plan (ITP). The ITP provides a framework to achieve realistic career goals based upon an assessment of your personal and family needs as well as your unique skills, knowledge, experience, interests and abilities. You create and maintain your ITP with assistance from your Transition Counselor<sup>1</sup> using the following template to coincide with the ones available in your specific transition workbook(s). The ITP mirrors the TAP outcome-based curriculum and provides a means to discover and explore your skills and interests which may lead to potential post-transition career tracks. The ITP helps you identify critical activities associated with your transition and your Transition Counselor will assist you through the process of organizing your transition into manageable tasks. The ITP also helps you to establish a timeline for completing all required activities prior to separation – it is a living document and can be modified at any time. The ITP is the road map for attaining your employment, education, vocational training, and entrepreneurial objectives and can help you make a successful transition to civilian life. To develop a successful ITP you must consider the following critical elements in your planning process:

- Identify Post-transition Personal/Family Requirements
  - Taking Care of Individual/Family Needs
  - Assessing Benefits and Entitlements
  - Getting Financially Ready
- Evaluate Military and Civilian Experience and Training
  - Documenting Job Related Training
  - Verifying Eligibility for Licensure and Certification
  - Identify career field(s) you are qualified to enter
- Determine Post-transition Career Track(s)
  - Finding a New Job
  - Continuing Your Education
  - Pursuing Vocational Training
  - Starting a Business

<sup>1</sup> *Transition Counselor* is a term used by the Army

## CAREER READINESS STANDARDS

It is important to note that there are Career Readiness Standards you will be expected to meet before your transition date. You will be required to provide documentation of meeting career readiness standards to your Transition Counselor and Commander or Commander Designee prior to transition. These standards are designed to increase your ability to successfully overcome any challenges you may face in pursuit of your transition goals. Different Career Readiness Standards may apply to specific career track(s).

### Career Readiness Standards

- ☐ Meet with a Transition Counselor in person or by video conference to complete an Individualized Initial Counseling, complete a Self-Assessment and be assigned a Tier
- ☐ Attend Pre-Separation Counseling
- ☐ Complete Pre-Separation Counseling Needs Assessment DD Form 2648 eForm. Copy will have "DRAFT" watermark until completed and signed by Commander.
- ☐ Attend Army Day
- ☐ Attend DOL Employment Day
- ☐ Attend VA Day
- ☐ Register for VA Benefits (eBenefits)
- ☐ Complete the Individual Transition Plan (ITP)
- ☐ Evaluate opportunities presented by continuing military service in a Reserve Component (Active Component only)
- ☐ Complete a Gap Analysis
- ☐ Prepare a post-transition financial plan
- ☐ Attend Capstone which includes review of Individual Transition Plan and provide documentation of meeting the Career Readiness Standards for the assigned Tier with submission of DD Form 2648 eForm (will print as draft until signed by Commander)

### Employment Track Career Readiness Standard

- ☐ Complete a resume or provide verification of employment

### Education and Vocational Track Career Readiness Standard

- ☐ Complete a comparison of colleges/universities and/or technical schools

### Entrepreneurship Track Career Readiness Standard

- ☐ N/A

## POST-TRANSITION PLANS

### Section I. Identify Post-transition Personal/Family Requirements

#### A. Taking Care of Individual/Family Member Needs

- ☐ Identify individual/family needs such as medical care, expenses, and location of potential providers.
  - Schedule final physical (SHPE or SHA) and dental checkups and speak with your Tricare representative about Transitional Healthcare Benefits. Visit [www.healthcare.gov](http://www.healthcare.gov) to evaluate costs of health insurance.
- ☐ Identify extenuating individual/family circumstances (e.g. need to provide care for elderly parents, family business, exceptional family member needs, etc.).
- ☐ Assess impact of individual/family requirements on relocation options (e.g. quality of local schools, availability of medical care, spouse employment opportunities, etc.).
- ☐ Evaluate your immediate post-transition housing requirements.
  - Determine living space needed. Consider making more than one move or utilizing temporary storage.
  - Contact the housing referral office to set up transportation counseling. The installation transportation office can provide detailed information about planning the movement and storage of your household goods.
  - Visit the VA website: <https://www.va.gov/housing-assistance/home-loans/> to get information on the VA home loan guaranty program.
- ☐ Consider your post-transition transportation requirements.
  - Determine what reliable transportation can take you to and from work or school.
  - Evaluate your commuting options.
  - Determine transportation needs for spouse and/or dependents.
  - Identify your post-transition transportation expenses to include: purchase costs, vehicle registration, insurance, maintenance, fuel, etc.
  - If you are disabled, determine if you are eligible for assistance in purchasing a vehicle and/or automotive adaptive equipment by visiting: <https://www.va.gov/disability/eligibility/special-claims/automobile-allowance-adaptive-equipment/>
- ☐ Evaluate if the thought of leaving the military creates increased feelings of stress or anxiety on you and your family.
- ☐ Consider your support system.
  - Who do you go to for advice, personal counsel and/or mentoring in a difficult challenge or decision?
  - Will you still have access to those persons after you transition from active duty?
  - Determine what steps you need to take now to maintain contact and continue those relationships.
  - Determine how to establish this type of support in the community where you will live.

Notes:

**B. Assessing Benefits and Entitlements**

- ☐ Evaluate the benefits (e.g. additional income, promotions, leadership and professional development opportunities, travel) associated with continuing your military service in either the Reserves or National Guard (if applicable). Consider the financial impact of continued entitlements such as medical and dental coverage, life insurance, military exchange, commissary, club privileges, recreational and athletic facilities. Contact the installation/local recruiter to schedule an informational counseling session and identify potential units/positions. Would this financial impact be beneficial?

Notes:

**C. Getting Financially Ready**

- ☐ Identify anticipated financial obligations such as dependent college savings plan, retirement savings plan, utility security deposits, and additional commuting/transportation expenses (e.g., additional car payment, fuel, maintenance, renter's home, or life insurance).
- ☐ List required new civilian workforce wardrobe items and estimate expenses.
- ☐ Develop an action plan to reduce/eliminate current debt: <https://powerpay.org/>
- ☐ Develop a spend plan based on your current financial obligations (e.g., living expenses and indebtedness) as well as anticipated post-transition expenses.
  - ☐ Determine if your expected post- transition income will adequately address anticipated financial obligations (e.g. housing, medical, food, insurance, transportation, costs of establishing a home, utility security deposits, etc.).
- ☐ Estimate your annual civilian salary/income requirements: \_\_\_\_\_

Notes:

## Section II. Evaluate Military and Civilian Experience and Training

### A. Documenting Job Related Training

- ☐ List the documentation of your civilian and military experience/training (e.g., certifications, diplomas, transcripts, licenses, etc.) that you need to gather for resume development. This may require research on your behalf to contact former technical training and academic institutions to identify their specific procedures and any applicable fees for providing this service.

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

- ☐ Verify your military experience and training (VMET) at: [www.dodtap.mil/login.html](http://www.dodtap.mil/login.html). Assistance is available by meeting with a Transition Counselor and instruction is available by attending the MOS Crosswalk Course. Review the list of schools documented on the VMET site. If necessary, gather documentation and list below all military professional development schools you completed that are missing from the VMET site.

<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

### B. Verify Eligibility for Licensure and Credentialing

- ☐ Crosswalk your military skill set to the corresponding civilian AND identify and document transferable credits earned through your military experience and training and verify your eligibility for licensure, certification and apprenticeship programs.

### C. Identify career field(s) you are qualified to enter.

- ☐ Conduct personal research to explore and evaluate potential career field options.
- ☐ Refine your research to identify desired industries, careers, jobs and salaries. Consider the public and private sectors. Identify any prerequisites you would have to complete (e.g., education, training, certification, licensure, security clearance) before being fully qualified to seek employment.
  - Now that you identified potential careers, evaluate your ease to relocate and find new employment. Find where opportunities exist by researching employment websites such as: <https://www.usajobs.gov/> and American Job Centers <https://www.careeronestop.org/Site/american-job-center.aspx>
  - Now that you know where potential jobs exist, research those locations to determine if they meet your personal/family requirements. Explore state, city and county websites to evaluate demographics, school ratings, tax rates, cost of living, availability of housing, home prices, etc. Assistance is also available through your installation relocation assistance office and through the U.S. Bureau of Labor Statistics: <https://www.bls.gov/data/>

Notes:

### Section III. Determine Post-transition Career Track

#### A. Designate the career field you wish to pursue based on your personal, family and financial obligations and desires.

Identify desired Career Field(s): \_\_\_\_\_

Identify desired Relocation Destination(s): \_\_\_\_\_

#### B. Designate your transition track.

❖ Select the transition track(s) you wish to pursue. Use the statements below each track to help you determine which step(s) to take next.

☐ Employment

- I require additional assistance to further explore future employment opportunities.
- I need to write/update my resume.
- I need to learn more about networking, interviewing, and job search prep.

☐ Education

- I require additional education in my desired career field.
- I plan to enroll in college or university.
- I plan to obtain professional licensure or certification.

☐ Vocational

- I require additional vocational training in my desired career field.
- I plan to enroll in vocational training or apprenticeship.
- I plan to obtain professional licensure or certification.

☐ Entrepreneurship

- I require additional SBA training to start my own business.
- I need to begin or complete a business plan.

☐ Other

- I am fully qualified to seek immediate employment in my desired career field and am ready to apply to the position I want.
- I have been offered a job that meets my post-transition personal/family/financial obligations and relocation plans.
- I currently already have the position I want in my desired career field.
- I currently or will be enrolled in a higher education or vocational institute.
- I currently own my own business or will be taking over a family business.

#### Check-In:

- ☐ I have been assigned a Tier
- ☐ I understand my Career Readiness Standards and the deliverables associated with my Career track(s)
- ☐ I have attended Pre-Separation Counseling and I do not have any follow-on questions
- ☐ I have selected a Career Track(s)
- ☐ I have been scheduled for additive classes or follow-up counseling(s) and have received my appointment slips

## CAREER TRACK – EMPLOYMENT

### Section IV. Employment

Note: Any Guard or Reserve member facing employment difficulty prior to or after an active duty tour can contact Employer Support of the Guard and Reserve <http://www.esgr.mil/> to learn their legal rights. ESGR will work to resolve conflicts or misunderstandings between the member and their employer. Also be aware of the rights you have under USERRA (<https://www.esgr.mil/USERRA/What-is-USERRA>)

#### A. Begin to develop a private and/or federal draft or master resume.

- ☐ Identify your hard skills.
- ☐ Identify your soft skills.
- ☐ Identify at least 3 professional references\* (former Commanders, supervisors, and employers who have firsthand knowledge of your technical proficiency, work ethic, devotion to duty, etc.).

Name #1: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Organization: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Name #2: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Organization: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Name #3: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Organization: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

- ☐ Identify at least 3 personal references\* who can speak to your character, integrity, values and morals.

Name #1: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Organization: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Name #2: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Organization: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

Name #3: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Organization: \_\_\_\_\_ Phone/Email: \_\_\_\_\_

\* Note: It is strongly recommended to advise your references that they may be contacted by a third party.

- ☐ Volunteer service constitutes work experience and also demonstrates your willingness to support your community. Identify your volunteer/community service activities.

Organization: \_\_\_\_\_ Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Event/Role: \_\_\_\_\_

Organization: \_\_\_\_\_ Start Date: \_\_\_\_\_ End Date: \_\_\_\_\_

Event/Role: \_\_\_\_\_

- ☐ Develop your application packet and review it with your Transition Counselor.
- ☐ Develop a cover letter and review it with your Transition Counselor.
- ☐ Become familiar with the job application process.

Notes:

## **B. Strengthen your employment prospects.**

- ☐ Develop a job search network of colleagues, family and friends, and join a professional organization (e.g. an organization representing the interests of your chosen career field, military officers, NCOs, spouses or retirees).
- ☐ Volunteer in a related career field to gain missing experience.
- ☐ Seek additional education, technical training, licenses, and/or certification.
- ☐ Schedule informational (practice) job interviews.
- ☐ Establish a USAJobs account and research potential federal employment opportunities.
- ☐ Seek out and utilize additional resources such as registering with the local Career One-Stop Center: <https://www.careeronestop.org/LocalHelp/local-help.aspx>

Notes:



**Check-In:**

- ☐ I have attended the Department of Labor Employment Track (one-day)
- ☐ I have attended the Department of Labor Employment Track (two-day)
- ☐ I have begun my resume
- ☐ I understand my Career Readiness Standards and the deliverables associated with my track(s)
- ☐ I have updated my ITP in regards to my employment research
- ☐ I have been scheduled for additive classes or follow-up counseling(s) and have received appointment slips

Follow-Up Questions or Concerns:

What actionable steps do I need to take to position myself and/or my family for success?

Additional Resources:

## CAREER TRACK(s) – EDUCATION OR VOCATIONAL

### Section V. Education or Vocational

#### A. Complete an Education Needs Assessment

- ☐ Summarize the results of Education Needs Assessment.
- ☐ Gather documentation of military and civilian education completed, to include certificates of training and college transcripts (refer to VMET, JST, and MOS Crosswalk section). Contact your former academic / training institute to request official transcripts and identify any associated fees.
- ☐ Calculate American Council on Education (ACE) credits earned for military training (if applicable): <http://www.acenet.edu/Content/NavigationMenu/ProgramsServices/MilitaryPrograms/index.htm>
  - ☐ Identify the number of ACE credits earned: \_\_\_\_\_
- ☐ Identify the field of study and degree that you plan to pursue.

Field of study: \_\_\_\_\_

Degree: \_\_\_\_\_ Target completion date: \_\_\_\_\_

- ☐ Explore DoDSkillbridge opportunities (<https://dodskillbridge.com/>) and Army Career Skills Program (<https://home.army.mil/imcom/index.php/customers/career-skills-program>)

Notes:

#### B. Assess educational financing options.

- ☐ Review GI Bill benefits - visit: <http://www.gibill.va.gov/> and <http://www.ebenefits.va.gov> for more information.
- ☐ Determine if you will attend school part-time or full-time or online vs brick and mortar and identify how many credit hours you will take each semester.
- ☐ Identify potential sources of income while attending school (e.g., employment options and scholarship/grant eligibility including academic, athletic, need-based, veteran status, college/career specific). Assistance is available by attending the Education Workshop and by visiting the Department of Labor Career One Stop website: <http://www.careeronestop.org/ReEmployment/Veterans/>
- ☐ Research Credentialing Assistance, Tuition Assistance, Army COOL and USMAP opportunities.

Notes:

### C. Identify academic institution.

- ☐ Research academic institution to include: tuition costs, fees, accreditation, financing options, graduation rates, transferring credits, procedures for sending transcripts for credit review, GI Bill acceptance, and admission standards. Assistance is available through your Education Counselor and by attending the SFL-TAP Education Workshop.
- ☐ Research standardized testing requirements of potential academic institutions (e.g., SAT, SAT II, GRE, GMAT, MCAT, LSAT, CLEP) and identify local testing schedules, locations and fees:  
<http://sat.collegeboard.org/home>, <http://www.ets.org/>, <http://www.mba.com/>,  
<https://www.aamc.org/students/applying/mcat/>, <http://www.lsac.org/>, and  
<https://www.dantes.doded.mil/index.html>
- ☐ Compare research results of academic/vocational institutions that offer degrees/credentials in your desired field of study.
- ☐ Identify your top 3 academic/vocational institutions.

- \_\_\_\_\_ Location: \_\_\_\_\_
- \_\_\_\_\_ Location: \_\_\_\_\_
- \_\_\_\_\_ Location: \_\_\_\_\_

- ☐ Submit an application to the institution(s) you have selected; be aware of submission deadlines.

Name of institution: \_\_\_\_\_ Submission Deadline: \_\_\_\_\_

Name of institution: \_\_\_\_\_ Submission Deadline: \_\_\_\_\_

Name of institution: \_\_\_\_\_ Submission Deadline: \_\_\_\_\_

- ☐ Identify the appropriate academic counselor at your institution and schedule a one-on-one or telephonic counseling session. Academic counselors are typically located by visiting the school's registrar and/or admissions website. Additional degree-specific information may also be sought by contacting the faculty/staff within your specific field of study.

Notes:

Name of counselor/advisor: \_\_\_\_\_

- ☐ Contact the Student Veteran Organization (<http://www.studentveterans.org/>) at your preferred school (if available), or the local VA Representative to identify local Veteran support resources.

Notes:

Name of contact: \_\_\_\_\_

☐ Have you received an acceptance letter to an academic institution?

\_\_\_\_\_ Yes, and a copy of my acceptance letter is available.

\_\_\_\_\_ No, but I anticipate a response from the institution within the next couple of weeks.

\_\_\_\_\_ No, but I will continue to research and apply to other institutions that meet my post-transition educational goals and relocation plan.

**Check-In:**

- ☐ **I attended the Education or Vocational Track**
- ☐ **I understand my Career Readiness Standards and the deliverables associated with my track(s)**
- ☐ **I have completed an Interest Profiler or Needs Assessment**
- ☐ **I have obtained my JST/VMET**
- ☐ **I have updated my ITP in regards to my Education or Vocational Track**
- ☐ **I have been scheduled for additive classes or follow-up counseling(s) and have received appointment slips**

Follow-Up Questions or Concerns:

What actionable steps do I need to take to position myself and/or my family for success?

Additional Resources:

## CAREER TRACK - ENTREPRENEURSHIP

### Section VI. Entrepreneurship

- ☐ Evaluate your applicable skills (e.g. leadership, initiative, strong work habits, persistent, adaptable).
- ☐ Schedule a counseling session with a Small Business Administration Advisor: [www.sba.gov](http://www.sba.gov)

Notes:

Name of advisor: \_\_\_\_\_ Date attended: \_\_\_\_\_

#### A. Begin developing a business plan.

- ☐ Provide an in-depth description of the type of business products and services you plan to offer.

Notes:

Type of business: \_\_\_\_\_

- ☐ Determine whether your customers will come to you or if you will have to go to your customers.
- ☐ Determine business space requirements, acreage, employee/customer parking, facilities, etc.
- ☐ Identify your desired customer demographic requirements.
- ☐ Research and identify your competitors.
- ☐ Research potential business location while considering ease of access, proximity to your competitors, zoning policies, city ordinances, sign regulations, etc.
- ☐ Identify potential suppliers and secure letters of intent.
- ☐ Research and identify marketing strategies for your business.
- ☐ Research and develop operating procedures that are appropriate for your business. Determine ways to utilize technology to enhance your business.
- ☐ Research and determine staffing requirements.
- ☐ Research and identify potential insurance plans and providers. Register with your state to obtain workers' compensation, unemployment and disability insurance and legal actions that must be taken for hiring employees.
- ☐ Identify anticipated financial requirements such as preparing loan applications, purchasing equipment and supplies, maintaining balance sheets, performing breakeven analysis, and preparing profit and loss statements.

Notes:

**B. Determine the legal requirements of your business.**

- ☐ Research and determine what form of business entity to establish (i.e., sole proprietorship, partnership, corporation, S corporation, or limited liability company).
- ☐ Research and evaluate the differences and benefits of For-Profit and Non-Profit firms and identify the advantages of each.
- ☐ Determine applicable tax filing requirements (e.g., income tax, self-employment tax, taxes for employers, excise taxes, etc.) and research state and local tax requirements (e.g., tax registration, tax permit, income taxes, employment taxes, property tax, etc.).
- ☐ Obtain a tax identification number from the IRS and your state revenue agency.
- ☐ Research federal, state and local licenses and permits required for your business (e.g., agriculture, alcohol beverages, radio and television broadcasting, transportation, logistics).
- ☐ Identify additional legal concerns such as examining the tax returns and personal financial statements of company principals/partners for the last three years.
- ☐ Register your business name with your state government.

Notes:

- ☐ Determine target completion date of business plan: \_\_\_\_\_

**Check-In:**

- ☐ **I have attended the Entrepreneurship Track**
- ☐ **I have elected to attend the additional 8 week course**
- ☐ **I have started a business plan**
- ☐ **I have updated my ITP in regards to the Entrepreneurship Track**
- ☐ **I have been scheduled for additive classes or follow-up counseling(s) and have received appointment slips**

Follow-Up Questions or Concerns:

What actionable steps do I need to take to position myself and/or my family for success?

Additional Resources: