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1 Apr 2011

MARINE CORPS ORDER 1553.2B

From: Commandant of the Marine Corps  
To: Distribution List

Subj: MANAGEMENT OF MARINE CORPS FORMAL SCHOOLS AND TRAINING DETACHMENTS

Ref: (a) MCO 1553.1  
(b) Marine Corps Systems Approach to Training (SAT) Manual  
(c) MCO 1580.7D  
(d) MCO 1553.4B  
(e) MCO P3500.72A  
(f) NAVMC 3500.14B  
(g) MCO 5311.1D  
(h) MCO P7100.8K  
(i) MCO 3500.27B  
(j) MCO 5100.29B  
(k) CJCSI 1800.01D, "Officer Professional Military Education Policy (OPMEP)," July 15, 2009  
(l) CJCSI 1805.01, "Enlisted Professional Military Education Policy," October 28, 2005  
(m) MCO 1200.13F  
(n) NAVMC 3500.37A  
(o) MCO P5102.1B  
(p) MCO 3504.2  
(q) TECOMO 5041.1  
(r) MCO 1550.26  
(s) MARADMIN 178/10  
(t) TRNGCMDO 5401.1, Training Command Standard Operating Procedure  
(u) SECNAVINST 5211.5E  
(v) NAVMC Directive 5100.8  
(w) SECNAVM M-5510.30  
(x) OPNAVINST 1500.75B  
(y) 10 U.S.C. 5041 Headquarters, Marine Corps: function; composition  
(z) SECNAV M-5210.1

Encl: (1) Formal Schools Management Procedural Guidance (Appendices A-S)  
(2) High Risk Training Instructor Pre-Assignment Checklist  
(3) Formal Schools Seat Coordinating Instructions  
(4) High Risk Training Courses at Formal Schools

1. Situation. Establish management policies and procedures for the establishment and operation of Marine Corps Formal Learning Centers. References (a) through (z) apply.

2. Cancellation. MCO 1553.2A.

3. Mission. This Order delineates and defines matters related to Marine Corps training and education at Formal Learning Centers (FLCs) in Training Command (TRNGCMD) and Training and Education Command (TECOM). Such matters

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include, but are not limited to, development of individual and collective training events, oversight of formal school training management procedures, and proponency for worldwide Marine Corps training support resources. Utilizing the guidance found in enclosure (1) will increase FLC mission effectiveness throughout the Marine Corps.

4. Execution. Reference (a) details the overarching policy for the Marine Corps Training and Education System. The standards and procedures set forth in references (a) through (d) apply to commanders and all personnel assigned to Marine Corps Formal Learning Centers. FLCs will ensure that all Programs of Instruction (POI) are developed based on the guidance contained in either reference (b) or enclosure (1) of this Order, or reference (d).

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. FLC Commanders/Directors/OICs shall administer their school and subordinate courses per this Order to ensure continuity of service level processes and satisfaction of identified learning requirements. It is imperative that all FLCs develop standards based instruction in accordance with reference (b).

(2) Concept of Operations

(a) Under the authority vested in the Commandant of the Marine Corps (CMC) by Title 10 USC, the Commanding General, Marine Corps Combat Development Command (MCCDC) advises and guides Marine Corps commanders of the operating force and supporting establishments in all matters related to training.

(b) The Commanding General, Training and Education Command (CG, TECOM) is responsible for validating learning requirements and overseeing FLC training.

(c) Commanding officers/Directors/OICs of FLCs shall follow the policies in this Order, as well as the guidance contained in reference (b), and enclosure (1).

(d) Inspector General of the Marine Corps evaluates the effectiveness of the implementation of the policies and procedures outlined in reference (b) and enclosure (1) during inspections utilizing the Automated Inspection Reporting System (AIRS) 400 Formal School checklist.

b. Tasks

(1) Deputy Commandant, Manpower and Reserve Affairs (DC, M&RA); Director, Personnel Management Division (MM); Director, Reserve Affairs Division (RA) shall:

(a) Report all manpower issues impacting training and education to CG, TECOM for resolution.

(b) Comply with appropriate coordinating instructions contained within the references for determining formal school seat requirements.

(c) Validate, prioritize, and submit Training Input Plan (TIP) requirements to CG, TECOM (C 4611).

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(b) Comply with appropriate coordinating instructions contained within the references for determining formal school seat requirements.

(c) Validate, prioritize, and submit Training Input Plan (TIP) requirements to CG, TECOM (C 4611).

(d) In concert with FLC Commanding Officers/Directors/OICs Pre-screen all High Risk Training (HRT) Instructor candidates per enclosures (2) and (3) prior to assignment to Marine Corps Formal Schools or Detachments.

(2) Deputy Commandants of the Marine Corps, Division Directors, and Heads of Separate Offices, Headquarters, U. S. Marine Corps, Deputy Directors, MCCDC shall:

(a) Provide inputs to proposed training and education affecting their occupational fields.

(b) Assist CG, TECOM in the determination of training and readiness events and learning outcomes, revisions to existing curricula, the infusion of Distance Learning (DL) technologies, and the development and execution of an integrated curriculum plan for Military Occupational Specialty (MOS) and non-MOS learning requirements outlined in references (c), (d), (e), and (f).

(c) Report any issues concerning training or education to CG, TECOM for resolution.

(d) Solicit learning requirements from the operating force in order to submit the next fiscal year and follow-on fiscal out-year training requirements into the TIP.

(e) Attend annual TIP conference with representatives from each Marine Expeditionary Force in order to submit learning requirements.

(f) Provide CG, TECOM with five-year skill enhancement training requirements and other than entry-level and lateral move MOS training requirements for active component MOSs under their cognizance. These requirements will be entered into the TIP.

(g) Serve as the principal point of contact between the Total Force Structure Officer (TFSO) and the Marine Corps with regard to force structure requirements, intended structure changes, and unique operational considerations that may affect force structure and result in occupational field (OccFld) assignment actions. Conduct such liaison in accordance with reference (g).

(h) Determine FLC seat requirements per enclosure (3).

(3) Commanding General, Training and Education Command (TECOM) shall:

(a) Promulgate, develop, coordinate, monitor, and evaluate training and education policy, plans, concepts, and programs for training in Formal Learning Centers.

(b) Establish Formal Learning Centers to satisfy Marine Corps-wide learning requirements.

(c) Direct Formal Learning Centers to develop POIs that satisfy the learning requirements identified in references (c), (d), (e), (f), and appropriate community Training and Readiness (T&R) manuals.

(d) Conduct and review evaluations of instruction performed in the FLCs and resolve all issues.

(e) Determine priorities and allocate assigned resources to support valid FLC learning requirements.

(f) Review and approve POIs for all courses taught at Marine Corps FLCs for which CG TECOM is the first General Officer in the chain of command as identified at the TECOM website at <https://www.intranet.tecom.usmc.mil/hq/divisions/g3/currops/ORGANIZATIONCHARTS/TECOMORGANIZATIONCHART.doc>. Review all equivalent course documents from other service schools and civilian courses to determine if they meet Marine Corps learning requirements. (C 469/C 4610)

(g) Manage school seat requirements for the Marine Corps. Publish the annual TIP and related Training Quota Memoranda (TQM). (C 4611)

(h) Identify, in conjunction with MOS/OccFld Advocates, and include in the Marine Corps Training Information Management System (MCTIMS) Student Registrar, all pre- and post-course requirements for Marine attendance and graduation. (C 4611)

(i) Develop and publish the annual TIP based on manpower requirements submitted by the Deputy Commandant for Manpower and Reserve Affairs (DC, M&RA), HQMC, and other formal learning requirements as submitted by OccFld advocates and force commanders. (C 4611)

(j) Assist schools with the use of MCTIMS for the development of Programs of Instruction for each course, conducting student evaluation, managing student data, managing class data, and scheduling lessons. (C 469)

(k) Provide Curriculum Assistance Visits (CAV) to requesting Marine Corps Formal Learning Centers. (C 469/C 4610)

(l) Develop and publish Training and Readiness (T&R) Manuals. (C 469/C 4610)

(m) Consolidate and submit all costing data for FLCs execution of approved POIs in accordance with reference (h). (C 464)

(n) Coordinate Program Objective Memorandum (POM), Program Reviews and Financial Budget Plan data calls with FLCs for identification of funding requirements. (C 4671)

(o) Coordinate product development priorities for the receipt, evaluation, staffing, and tasking of Marine Corps Institute (MCI) products. (C 468)

(p) Develop distance-learning courseware for entry-level, MOS, and by-grade professional development based on approved training and readiness events and/or learning outcomes. (C 468)

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(q) Assist schools and units within the Operating Force with the use of MCTIMS Student Registrar module to maintain accountability of students from course commencement through graduation (add/drop, to/from). (C 4611)

(r) Establish a Commanding General's Inspection Program (CGIP) to assist, inspect, and assess mission readiness of FLCs.

(s) Review, approve, and designate courses meeting HRT criteria set forth in this Order as "high risk" and include as changes to enclosure (4).

(4) Commanding General, Training Command (TRNGCMD) shall:

(a) Exercise command and operational control of all assigned Marine Corps Formal Learning Centers.

(b) Manage policies and administrative procedures for the application of the SAT and Operational Risk Management (ORM) processes in the formal schools.

(c) Submit for review, validation, resourcing, and approval, all POIs for FLC courses to CG, TECOM (C469/C4610) every two years.

(d) Provide and maintain the Train the Trainer School (T3S) to support the training requirements of Formal School instructors, curriculum developers, school administrators, and Operating Force and Supporting Establishment Unit Training Managers.

(5) Commanding General, Education Command (EDCOM) shall:

(a) Exercise command and operational control of all assigned PME schools.

(b) Manage policies and administrative procedures for the application of Instructional Systems Development (ISD) and ORM processes in the PME schools. Detail policies and procedures for all subordinate commands/institutions in accordance with reference (d).

(c) Submit for review, validation, and resourcing all Programs of Instruction for PME schools to CG, TECOM as required.

(6) Director, Safety Division, Headquarters Marine Corps shall:

(a) Coordinate the participation of safety managers in periodic FLC inspections or curriculum assist visits with TECOM Safety Division as well as base and station safety offices. These inspections or assist visits will occur on a periodic basis not to exceed 2-year intervals.

(b) Maintain memorandum of understanding (MOU) with the Commander, Naval Safety Center (NAVSAFCEM) so required HRT safety inspections and assist visits to all FLCs are conducted. (Note: Safety assist visits differ from safety inspections in that they render assistance pertaining to a specific safety problem vice a complete safety overview. Assist visits may be requested, as required. These visits are at no cost to the requesting unit.)

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(c) Develop, and audit risk assessment checklists and inspect all HRT courses, listed in enclosure (4), or identified by the FLCs themselves on a periodic basis (not to exceed two year intervals), for compliance with this Order, references (i) and (j), and all other pertinent orders.

(d) Monitor the conduct of risk assessments for HRT courses under development, existing HRT courses, and HRT courses undergoing modification where elements of risk are introduced or removed.

(e) Upon request, assist the CG, TECOM/CG, TRNGCMD in assessing nominated courses as HRT.

(7) Commander, Naval Safety Center (NAVSAFCECEN) shall:

(a) Provide HRT program safety surveys and assist visits to all Formal Learning Centers listed in enclosure (4).

(b) Upon request, assist CG, TECOM in the review of courses nominated as HRT.

(8) Commanding Officers, Marine Corps Formal Learning Centers shall:

(a) Follow the directives found in references (a), (c through f), (i), and (j); observing the guidance in reference (b) and enclosure (1) to ensure approved training and education meets the readiness needs of the operating force and supporting establishment.

5. Administration and Logistics

a. Submit all recommendations concerning this Order to CG, TECOM via Training, Management and Evaluation, Ground Training Branch (C469TMEB).

b. Developers, owners, and users of all Marine Corps information systems have the responsibility to establish and implement adequate operation and information technology controls including records management requirements to ensure the proper maintenance and use of records, regardless of format or medium, to promote accessibility and authorized retention per the approved records schedule and reference (z).

6. Command and Signal

a. Command. This Order is applicable to the Marine Corps Total Force.

b. Signal. This Order effective the date signed.



G. J. FLYNN  
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## Chapter 1

### Curriculum Development

1. Background. The Marine Corps FLCs shall be administered in accordance with this Order and enclosures. FLC adherence to guidance found in enclosure (1) will increase mission effectiveness throughout the Marine Corps. To meet the learning requirements of the contemporary and future operating environment, a balanced integration of training and education across the continuum is necessary. FLCs must achieve this balance to meet the learning requirements through standards based and outcome driven instruction that is guided by this enclosure and reference (b).

#### 2. Training and Readiness

a. There are two Training and Readiness (T&R) programs within TECOM - the Aviation T&R and the Ground T&R Program, see references (e) and (f) respectively. Together these programs provide T&R requirements that enable commanders to attain and maintain combat readiness at the individual and unit levels in order to support MAGTF and combatant commanders while conserving resources. The T&R Programs provide policy and guidance for development and standardization of all USMC T&R Manuals.

b. These T&R Programs are based on Operating Force requirements and performance based standards designed to ensure unit proficiency in combat skills. The standards established in these programs are validated by Subject Matter Experts (SME) to maximize combat capabilities for a unit assigned Mission Essential Tasks (MET). Both T&R Programs produce fundamental tools used by commanders of FLCs to construct and maintain effective formal programs of instruction for entry-level and skills-progression. T&R Manuals also support unit Managed On-the-Job Training (MOJT) and unit readiness by identifying METs and the standards for individual and collective events.

#### c. Individual Training Events (ITEs) and Joint Learning Objectives (JLOs)

(1) The Marine Corps T&R Programs require the establishment of Individual Training Events (ITE) that are based on specific requirements and performance standards to ensure a common base of training and depth of combat capability; ITEs provide a standard of competence to be achieved. ITEs are established per references (e) and (f), and published in Marine Corps T&R Manuals in the NAVMC 3500 series. An occupational field (OccFld) whose ITEs are established by Joint, DoD, or Interagency publications reproduce those ITEs verbatim into the applicable T&R Manual.

(2) Individual Training Events form the foundation from which FLCs develop new or revised POIs. POIs identify the requirements to conduct a course, and any additional resources needed such as instructors, ranges, ammunition, facilities, and other logistical support, or the acquisition of new systems, equipment and/or devices.

(3) Joint Learning Objectives (JLO) are established in the joint instruction for Officer and for Enlisted Professional Military Education Policies (references (k) and (l), respectively). Marine SMEs represent the Marine Corps' interest at joint formal schools to ensure joint learning

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requirements are met. Gaps in joint training are identified by SMEs and instruction is developed to meet these gapped learning requirements.

d. TECOM. CG, TECOM executes responsibility to establish T&R policy and maintain T&R Manuals through the TECOM training divisions: Aviation Training Division (ATD) and Ground Training Division (GTD). ATD and GTD are tasked to execute and maintain their respective T&R Programs and ensure OccFld/Community/MOS/Common Skills T&R Manuals are revised, as required. Each training division assigns a task analyst to manage each OccField. These analysts are responsible for the timely revision of their assigned T&R Manual. They chair the T&R conference, assist/coordinate the conduct of the conference, obtain SME TAD funding through the TECOM Comptroller (C 464), and provide guidance on the "How to" of writing or revising T&R Manuals. The TECOM task analyst serves as the duty expert on TECOM programs, policies, and procedures during the conduct of a T&R conference.

e. Ground T&R Development Process

(1) T&R Conference. The T&R Development process begins with a conference at which SMEs from the Operating Force, OccField Sponsors, and schoolhouse personnel gather to determine the individual, and collective training events necessary to provide MOS mission capable Marines and Marine units to the Operating Force. The goal of the T&R Conference as the first phase of the T&R Development process is to identify and validate individual and collective events, build conditions, standards, performance steps/component events, identify event support requirements, and enter the information in the T&R Development Module of the MCTIMS. A model for the preparation of a T&R conference ROP is located in Appendix H.

(2) Front End Analysis (FEA). Front End Analysis surveys should be conducted in accordance with reference (m) and a FEA Report completed prior to a T&R development or review conference. The results of the FEA are provided as an information source for training standard development. Other pertinent information to be included can be found in reference (b).

(3) Draft T&R Manual. Following the T&R Development Conference, the TECOM Task Analyst will build event reports from MCTIMS and collate those reports with other information required in the T&R Manual to create a draft T&R for staffing to the Operating Forces, HQMC, and the Formal Learning Center. The draft T&R will be posted on the GTD website for staffing and will be staffed through Marine Corps Action Tracking System (MCATS) for comments. GTD will release a DMS message to the Operating Force and schoolhouse to identify the location of the draft T&R and provide instructions for reviewers to provide comment. The draft T&R will be provided for comment for thirty (30) days from release of the message. The entire staffing process takes approximately 131 days.

(4) Revision and Validation. Following culmination of the staffing process, the TECOM Task Analyst, in conjunction with the FLC and Occupational Field (OccField) Sponsor, will validate comments, make necessary changes to the draft T&R, and prepare the final draft for CG, TECOM signature. Once the CG signs the T&R, the approved version will be posted on the GTD website as a signed T&R Manual.

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f. Aviation T&R Development Process. Specific information regarding individual Aviation T&R Manuals, conduct of conferences, and staffing processes are governed by reference (f).

g. Marine Corps Formal Instruction

(1) Approved and published ITEs that are designated for instruction at the FLC become the foundation for the development or revision of a course. ITEs are designated as entry-level or post entry-level training. Entry-level and MOS producing FLCs instruct entry-level individual events. Those ITEs not designated for entry-level instruction may be included in skills-progression or non-MOS PME courses, or in unit Managed On-the-Job Training (MOJT) programs. ITEs can also be instructed using Distance Learning (DL) courses developed by the College of Distance Education and Training (CDET), Marine Corps Institute (MCI), Navy Knowledge Online (NKO), Defense Knowledge Online (DKO), and Army Knowledge Online (AKO).

(2) ITEs that are included in a formal course of instruction will have corresponding Terminal and Enabling Learning Objectives (TLO/ELOs). All TLOs and ELOs shall be taught and evaluated/tested in a formal school setting.

(3) FLCs training entry-level ITEs will certify in Section V of the POI, that all graduates of their courses can perform all the entry-level ITEs to standard and will also note where in the POI this mastery is accomplished. This certification is separate from mastery of learning objectives, since the Operating Forces will require the Marines to show proficiency in the actual events. FLCs will also note in Section V of the POI any entry-level ITEs not performed to the standard contained in the T&R Manual.

3. Program of Instruction. The Program of Instruction (POI) details the structure, content, and execution of the course. During the development phase of the Systems Approach to Training (SAT) process, all Marine Corps FLCs are required to create POIs using the Curriculum Management Module within MCTIMS and to submit POIs per this Order and reference (b). Courses of instruction developed and approved by other services shall be accepted as POI equivalent documentation as long as the OccField Sponsor, TECOM Task Analyst, and the formal school concur that the T&R event requirements for the particular course are being met by the other service POI. The Formal Learning Center will complete all 24 elements of the Course Descriptive Data (CDD) identified in par e(2) based upon the other service course documents.

a. Formal Learning Center Commanding Officer's Letter. The CO's Letter provides information necessary to identify the document. This includes the course title, Standard Subject Identification Code (SSIC), school name/address, and effective date. The effective date is left blank until the POI is approved, then the date approved is recorded. Each time a revised POI is approved, the new approval date is recorded.

b. Certification Page. The signed certification page signifies that the CG, TECOM or the Commanding General, TRNGCMD, as appropriate, has reviewed and approved the POI. The approved POI directs the school commander/director/OIC to implement the course of instruction. Local approval of any POI is not authorized.

c. Record of Changes Page. The record of changes page is a chronological log of all changes made to a POI. Each entry must indicate the change number, date of change, date received, date entered, and the signature of the individual entering the change. Changes entered in the change log should be administrative, and should not include a lengthening of the course, or the omission of TLOs. Any major change will be included in an update and resubmission of the POI.

d. Table of Contents. This table details the content of the POI and is arranged by section number and section title. The Table of Contents should include by section the following: Certification Page, Record of Changes, Preface, CDD, Summary of Hours, Scope of Annexes, Concept Cards, Student Evaluation, and Distribution List.

e. Course Descriptive Data (CDD). The Course Descriptive Data (CDD) within the Program of Instruction (POI) is the key document for all TECOM activities involved in the resourcing process. The CDD is part of the POI and is the school's estimate of the resource requirements for the course. Accurate reporting of the schools resources and requirements will provide the documentation and justification required to compete for resources in the Program Objective Memorandum (POM) process. Failure to provide accurate resourcing data in the CDD jeopardizes future funding for the FLC.

(1) FLCs will review all CDD portions of active POIs annually or more often as necessary in connection with the TECOM, G-7 and G-8 annual budgeting and programming.

(2) The CDD contains 24 essential elements providing the justification for development or refinement of formal training courses. The 24 elements provide a summary of the course, including the instructional resources, course length, breakdown of curriculum hours, and the task list indicated in the appropriate Training and Readiness (T&R) Manual(s) (see Appendix A). The task list located in the CDD only lists those ITEs that were selected for training within the POI. JLOs should also be manually entered and specified on the CDD task list. Specifically, the CDD does the following:

(a) Outlines the school's concept of how the course will meet the learning requirements established in the T&R Manual or Joint Instruction.

(b) Identifies resource requirements needed to conduct the course.

(3) Item 16 identifies Target Population Description (TPD) and Prerequisites. To reduce lesson purpose time in career progression courses, schools are encouraged to require Marines to complete relevant Distance Learning (DL) products prior to attending a resident course.

(a) The TPD and prerequisites for MOS producing courses should be identical to those found in the MOS Manual.

(b) Commanders waiving TPD requirements and prerequisites should track those Marines' performance and submit a waiver progress report quarterly to TRNGCMD and TECOM G3 via GTD OPS.

(4) Resource requirements are contained in CDD items 21, 22, 23 and/or the "CDD NOTES" after item 24. Manpower resource requirements are identified in items 21 and 22. All other resources are listed in item 23.

(a) Item 21 allows the school to reflect the total instructor requirement for a course by T/O number, line number, grade, billet and hours utilized for one iteration of the POI.

(b) Item 22 reflects the total personnel overhead requirement for the entire school.

(c) For item 21 and 22, it is imperative that the school indicate the actual deficiency (course requirement minus authorized T/O strength) in separate remarks so that there will be no confusion as to what additional personnel (if any) are required to implement the course. The MCTIMS data fields for items 21 and 22 contain preformatted Table of Organization (T/O) information and space for free text remarks.

(d) The number of instructors reported in the Instructor Computation Worksheet (ICW) should be a whole number. Therefore, all concept cards should reflect, in the student/instructor ratio, the number of instructors required to train the maximum class capacity of students in the course; concept card must match the maximum class capacity.

(e) Item 23 is entirely free text and will be used to list resource requirements other than personnel. It will list all requirements, but specifically emphasize the portion that exceeds current availability (e.g., the course requires 9 xyz widgets, the unit has 6 on-hand, hence the 3 xyz widget shortfall that needs highlighted in item 23). Item 23 will contain, at a minimum, the following:

1. Identity (nomenclature, name, type or title) of the deficiency.
2. Total amount required.
3. Amount on hand.
4. Deficiency.
5. Justification.

(5) Course data developed and approved by other services shall be accepted. FLCs will complete all 24 elements of the CDD based on the other service data and submit that CDD for staffing.

f. Summary of Hours. Section II of the POI relates to the breakdown of academic and non-academic hours. Annexes A-Y are for academic concept cards and annex Z is reserved for administrative concept cards. Due to MCTIMS' automatic calculations of academic and administrative hours from each concept card, the totals shown in this paragraph will match the instructional hours represented on the concept cards and the curriculum breakdown in the CDD (items #9 and #11).

(1) Academic Time. Time required actually transferring learning objective based instruction, evaluating performance, or conducting lesson purpose classes as discussed below.

(2) Non-Academic Time. Time instructors are in contact with students as required by the FLC Commander, TECOM/TRNGCMD directives, various Marine Corps Orders, and the POI. Non-academic time can include but is not limited to the following:

- (a) Physical Training (PT). (Exceptions see Par (4))
- (b) Chow.
- (c) Equipment Draw/Issue.
- (d) Transit.
- (e) Field day.
- (f) Overnight Duty (Duty NCO, Firewatch, etc).

(g) Administrative Time. Time required in the POI to complete administrative tasks necessary for the smooth functioning of the course. Instructors must be present during Administrative Time, but there is no requirement to prepare course materials. Administrative time includes:

- 1. Checking in.
- 2. Checking out.
- 3. Graduation practice/graduation.
- 4. Specialized uniform/equipment fittings.
- 5. Medical appointments.
- 6. Weapons' cleaning.

(3) Lesson Purpose. A Lesson Purpose class presents material that, while important, is not associated with learning objectives of a specific individual or collective training event and is not testable. Instructional hours not supporting the instruction or evaluation of course learning objectives is known as lesson purpose time and should be avoided to the greatest extent possible. Lesson purpose time may be used by FLCs for instruction deemed essential but not connected to learning objectives. FLCs should strive to meet the goal of no more than 1 hour of lesson purpose time a week so as to remain focused on instructing and evaluating the learning objectives of the course. If more lesson purpose time is necessary, FLCs may justify additional hours at POI submission with the task analyst.

(4) Physical Training (PT). PT will only be considered academic time when the specific PT event has a learning objective(s) and is instructed and evaluated. PT in all other cases may be conducted at the discretion of the commanding officer as non-academic time. PT as non-academic time should be scheduled whenever possible so it does not interfere with the minimum 7 hours of academic time each day.

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(5) Remediation. Remediation is neither academic nor non-academic time and must be conducted after-hours. Scheduled review sessions may be included in the examination time provided all students are involved; however individual remediation will not be captured in the POI. A description of the approach to remediation will be included in Section V of the POI.

g. Scope of Annexes. The scope of annexes carries a subheading, and details a description of the scope of each annex contained in the POI. If there is a difference in the scope between the conduct of the course during peacetime and mobilization, it must be annotated here.

h. Concept Cards. Section IV of the POI is made up of the concept cards. Concept cards comprise the bulk of the POI and provide a snapshot of all lessons, examinations, and administrative events. An introduction is provided to explain the description of the contents of the concept cards, the location of learning objectives report, and summaries of instructional hours.

i. Student Evaluation. Section V of the POI documents the scope of the evaluation, standards for successful performance, and evaluation procedures. Refer to the school SOP for guidance on specific evaluation procedures. Students must demonstrate mastery of all learning objectives. Student evaluation must be detailed and include, at a minimum, the evaluation philosophy (mastery/non-mastery/GPA), methods of evaluation (e.g., written, performance), Fitness Reports (if applicable), Pro/Con marks (if applicable), disposition of academic failures (recycle/MOS re-designation procedures).

(1) Each learning objective must be evaluated using one of the following methods:

(a) Performance Evaluations. The student actually performs the learning objective to standard and is evaluated using a checklist prepared in MCTIMS. Consistent with the objective evaluation of training and subjective evaluation of education, the performance checklist may be oriented on evaluating tangible or intangible characteristics in accordance with the learning objective standard.

(b) Written Evaluations. The student answers written questions either by selecting from a list, writing short answers or essays. These tests will be prepared in MCTIMS.

(c) By Exception. Some learning objectives contained in the Marine Corps Common Skills Vol 1 and 2 do not lend themselves to evaluation either by performance or written evaluations. These "by exception" events relate to ethics or values. An example of a "by exception" event would be a guided discussion or during another venue in which an instructor introduces values topics and encourages student feedback. These by exception events are evaluated based on the students ability to show understanding of DOD and Marine Corps policies. Students expressed opinions, views, and religious beliefs are not to be considered as part of an evaluation.

4. POI Documentation. FLC commanders shall ensure that the POI will be submitted in sufficient time to allow the TECOM/TRNGCMD staff to budget, include in the Program Objective Memorandum (POM), or otherwise commence action to obtain the required resources.

a. POI Validation. The designated resource manager at the FLC shall review and validate POI information prior to submission. Commanders shall verify the POI information is an accurate communication of how the FLC is executing resources for that course prior to staffing via the chain of command to TECOM/TRNGCMD for approval.

(1) Commanders shall certify the validity and accuracy of the POI by signing a cover letter from the CO to CG, TECOM or CG, TRNGCMD as appropriate, dated the same day the POI is submitted to TECOM electronically in MCTIMS. Should substantive changes be made to the POI following the initial submission, a new cover letter should be signed and dated to assure CG TECOM or CG TRNGCMD that the commander is aware of the most current version submitted for his approval. In standard Naval letter format on formal school letterhead, the commander will address in narrative: any shortfall(s) in funding, personnel, and equipment, as well as changes in course days, and requests for waivers for additional lesson purpose time. The cover letter should not contain all the details of revisions to items 21, 22, 23 but point the reviewer to those changes in the CDD validated in the ROP.

(2) As direct communication with CG TECOM or CG TRNGCMD, the Commander should ensure all issues of importance to the CGs are addressed. The cover letter also certifies that the Commander is aware of and approves the contents of the POI. The cover letter may be sent electronically in ".pdf" format to TECOM Ground Training Branch Operations.

b. If the POI being submitted cannot be executed with existing resources, the forwarding letter will identify those shortfalls most critical to the execution of the course. Normally, additional resources need to be programmed through TECOM G-8, which is done three years in advance.

c. When revising an existing POI, or for a new POI that does not require a Proof of Concept CDD, the schoolhouse develops the POI and forwards it to CG TECOM or CG TRNGCMD for approval. In the event that there are resource shortfalls, the school must detail actions planned or already underway to resolve those deficiencies (e.g., initiation of MILCON requests, T/O and T/E Change Requests (TOCR/TECR), request for additional funding, etc.) and explain the impact of not having these resources in place. These documents (e.g., TOCR, TECR) will be submitted in accordance with TECOM staff procedures in order to facilitate the TECOM staffing and approval process. If resources to support the POI are not available, include comments concerning the priority of the POI in support of the operating force's and advocate's requirements.

d. When a POI is submitted as a proposal to change a course, full justification for any recommended changes must accompany the revised POI in the cover letter. Reasons for changing a course include, but are not limited to, publication of new training events, changes to requirements published in a T&R Manual or Joint Instruction, new equipment, and revised tactics, techniques, procedures or doctrine. POIs modified as a result of Course Content Review Boards shall be accompanied by the CCRB Record of Proceedings (ROP) as an enclosure.

e. The POI checklist contained in Appendix O-33 will be annotated with the originator's name as well as the date completed, and submitted concurrently with the POI and the cover letter.



Appendix J. The POI will be staffed to the following offices for review, comment, and recommendations:

- (a) Applicable Occupational Field Advocate.
  - (b) HQMC, Manpower and Reserve Affairs.
  - (c) TECOM/Training Command G-1 (Analysis of personnel requirements).
  - (d) TECOM/Training Command G-3 (Current Ops/Future Ops).
  - (e) TECOM/Training Command G-4 (Analysis of equipment).
  - (f) TECOM/Training Command G-6 (Analysis of computer/IT related requirements).
  - (g) TECOM/Training Command Comptroller (Analysis of funding requirements).
  - (h) TECOM G-8 (Analysis of programming implications (funding; MILCON; equipment)).
  - (i) MAGTF Training Simulations Division.
  - (j) Range and Training Area Management Branch (ammunition requirements).
  - (k) College of Distance Education and Training (CDET)/Distance Learning Center (DLC).
  - (l) Formal Schools Training Division.
  - (m) Safety.
  - (n) Interservice Training Office.
- (3) Staff Resource Proponents (manpower, facilities, ammo, ranges, and supply/equipment) will identify resource shortfalls in their commodity area. Where issues may be resolved internally, proponents will make recommendations such as: adjust MCBUL 8011 to increase ammunition allocations, reassign personnel, adjust budgets to provide additional funding, etc. Proponents will clearly state any necessary follow-on actions required and who is responsible for initiating the action. When internal resolution is not possible, proponents will detail actions to be taken, and provide an estimated time line for when resources can be put in place. Proponents are directed to seek non-traditional solutions to address resource shortfalls until programming can be affected.
- (4) When staffing comments are returned, the TRNGCMD Action Officer or TECOM Task Analyst resolves any further discrepancies or determines whether further coordination is required. A recommendation to approve or disapprove the POI is then submitted to CG, TECOM.
- g. POI Approval. POI approval authority rests with CG, TECOM or CG, Training Command, depending on the chain of command for the FLC. The TECOM

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HQ or Training Command HQ conducts appropriate staff action to review, validate, and recommend resourcing, prior to submission to CG, TECOM or CG, Training Command for approval. This action is required for all POIs for new and revised Marine Corps formal courses of instruction, to include all Marine-unique courses attended by Marines at other service formal schools. POIs (or an equivalent document) for consolidated courses at other service schools are reviewed to ensure applicable T&R events are being addressed regardless of service teaching the course. The signature package presented to the appropriate CG will have a route sheet. The route sheet remarks will outline all unresolved issues and include recommendations for resolution. Attached to the paper will be all staffing comments and a letter approving or disapproving the POI. After signature by the appropriate CG, the decision letter indicating approval/disapproval is attached to the POI and it is returned to the FLC.

(1) The POI decision letter will be worded only as follows:

(a) "Approved". This approval is contingent on the FLCs ability to execute the course given the current level of resources. The letter may contain other guidance on distribution and prioritization for existing course resources in order to implement the approved POI, but the basic tenet - unconditional approval- remains.

(b) "Disapproved". Disapproval may be for a variety of reasons- not necessarily related to resourcing, however the reason will be clearly stated in the letter.

(c) "Approved, but further execution is not authorized until required resources are obtained". This conditional approval prohibits the schoolhouse from executing the POI until such time as TECOM and/or the school is able to arrange for sufficient resources to effectively teach the course. The letter will clearly state which resources are deficient, who has staff cognizance for further action to obtain the resources, and a tentative time-line for delivery of the resources.

(2) The importance of the POI letter cannot be overemphasized. The approval letter, not the POI itself, is the document which obligates TECOM activities to provide resources, or to take certain actions that will ultimately result in resources being provided as feasible.

(3) Once the POI is approved, it will be submitted by CG, TECOM (C 469/C 4610) to the American Council on Education (ACE) to determine if the course qualifies for vocational/collegiate credit. The ACE will review the POI to determine if the course is a candidate for credit review and contact the formal school to coordinate a site visit as appropriate.

h. POI Changes. POIs are dynamic documents. If changes are immediately required following approval of the POI (i.e., modification of the task list in the T&R Manual, or changes due to resource requirements are necessary), those changes will be identified to CG, TECOM or CG, TRNGCMD via ATD/GTD task analyst listing the necessary change, justification for change, and the impact on execution of the POI. The appropriate CG will approve those changes at the completion of staffing procedures outlined above. Commanders/OICs/Directors may not "locally approve" changes to the POI when those changes involve task list/T&R modification or changes in required resources. Allowable local changes are those that do not require additional

resources, add additional training days, or modify existing TLOs. (See Par 3c on how to record local changes.) Time-critical changes to T&R Manuals reflected in the working copy of the T&R Manual and approved by appropriate advocate, Task Analyst, and/or T&R sponsor, may be immediately integrated into formal school instruction, but must be formalized by submitting an updated POI for approval. Changes to T&R events based on emergent training requirements are to be submitted to CG, TECOM (C469) for review and approval.

i. POI Revisions. Major Subordinate Commanders (MSCs) will ensure FLCs submit POIs for review every two years from the date of initial approval, or sooner as the need requires, or as directed by CG, TECOM or CG, TRNGCMD. POI submission will follow the T&R Manual revision cycle to the maximum extent possible. The FLC, in concert with the assigned task analyst, will formulate a plan that outlines a schedule for POI submission and MLF completion. CCRBs will be conducted and revised POIs will be submitted within 120 days of T&R Manual approval, unless CG, TECOM or CG, TRNGCMD provides a waiver based on the following guidance.

(1) Tier 1 courses have the highest priority for curriculum development. FLCs will prioritize all POIs into Tier 1, Tier 2 and Tier 3 using the following criteria.

(a) Tier 1 Courses - Entry-level MOS producing courses, featuring 1000-level events.

(b) Tier 2 Courses - MOS career progression courses, featuring 2000 level events.

(c) Tier 3 Courses - All other courses conducted.

(2) If the volume of POIs affected by the update of the applicable T&R Manual makes the 120 day deadline untenable, the FLC CO may request an extension from CG, TECOM via CG, TRNGCMD. Requests for extensions of the 120 day deadline will be fully justified in a request to CG, TECOM or CG, TRNGCMD, via GTD Ops or ATD Ops, and must include a Plan of Action and Milestones (POA&M) along with submission dates for all affected POIs. Within the POA&M, priority should go to Tier 1 courses.

5. Proof of Concept CDD. At times, following Course Content Review Board (CCRB) recommendations, or a FLCs CO's initiative, FLCs will recommend new instruction to meet an existing learning gap or a critical learning requirement. To expedite the development of new instruction, a *Proof of Concept CDD* will be submitted containing the following information: course title, purpose, scope, length, location, class capacity, class frequency, provisional/draft task list, and training/education support requirements. The Proof of Concept CDD will identify critical resource shortfalls and detail interim plans for execution of this instruction until all resource requirements can be addressed.

a. The Proof of Concept CDD will be submitted under cover letter identifying why the course is required, what deficiencies it will correct, and why it will be conducted in a formal school setting. Documentation such as pertinent Marine Corps Center for Lessons Learned (MCCLL) information or the CCRB Record of Proceedings (ROP) will be included as an enclosure. The cover letter will also include an assessment of the school's ability to execute the instruction utilizing existing resources (instructors, structure,

facilities, equipment, funding). The Proof of Concept CDD will identify critical resource shortfalls and detail interim plans for execution of this instruction until all resource requirements can be addressed.

b. A Proof of Concept CDD for a new course that replaces an existing course will identify the replaced course identification (CID) and title, and the anticipated effective date of replacement.

c. The Proof of Concept CDD will also outline Advocate and other Agency (e.g. Manpower and Reserve Affairs (M&RA), Marine Corps Systems Command (MCSC) etc.) staff actions to address schoolhouse resource shortfalls.

d. POIs for Proof of Concept CDDs will be submitted to CG TECOM or CG, Training Command, ATD/GTD within 120 days following CG, TECOM or CG, TRNGCMD approval of the Proof of Concept CDD.

e. Proof of Concept CDDs will not be created nor submitted for a new course that has been directed by TRNGCMD, TECOM, MCCDC or higher. FLCs will conduct a learning analysis and develop a POI for submission following notification that the events to be trained have been put into MCTIMS or, using existing events that had an initial training setting of MOJT that have been modified so that the initial training setting is FORMAL. The POI for this new, directed course will be submitted within 120 days of notification.

#### 6. Master Lesson File

a. The Master Lesson File (MLF) is not a stand-alone document. Course information contained in the MLF and the training schedule must match the approved POI. MLFs will contain, at a minimum, the requirements listed in paragraph (b). The training schedule will contain, at a minimum, the lesson designators, titles, and times. The minimum peacetime course day is 8 hours; the minimum peacetime course week is 40 hours (8 hours a day multiplied by 5 working days). A course week will contain at a minimum 35 academic hours. The training schedule will follow the course structure to the maximum extent possible. There are no established maximum hours for a training day. Courses with a training need may have an extended academic day. Task analysts will review the average training day and average training week to evaluate if additional justification from the FLC is required for excessive academic day length.

b. MLFs will contain at a minimum, the following material:

(1) Learning Analysis Worksheets (LAWS). Documents the transition between the T&R events and learning objectives (Appendix O-2).

(2) Learning Objective Worksheets (LOWS). Describes the anticipated learning outcome, provides a measurement for each Learning Objective (LO), and contains test/evaluation items and selected methods and media for that specific LO (Appendix O-4).

(3) Concept Cards. Identifies all learning objectives, instructional methods and media, and the resources required to conduct entire lesson, exam, or event (Appendix O-11 through O-13).

(4) Lesson Plan. The lesson is written in such detail that an alternate instructor, with minimal preparation time, could effectively deliver the lesson (Appendix O-16).

(5) Student Outline. Refer to Appendix O-25 for a Student Outline Checklist.

(6) Supplemental Student Materials (if applicable).

(7) Media (or a description of the media and location). Refer to Appendix O-29 and O-31 for appropriate checklists.

(8) Instructor Preparation Guide (IPG). Refer to Appendix O-26 for an example of an IPG, and Appendix O-27 for an IPG Checklist.

(9) Operational Risk Assessment Worksheet (ORAW). The ORAW documents the school plan to conduct training in the safest manner possible. The ORAW documents the 5-step Operational Risk Management process as it relates to the lesson. Refer to Appendix O-15 and O-30.

Note: LAWS and LOWS are not required for lesson purpose classes. Computer Based Training (CBT) MLFs will contain an Instructor Preparation Guide.

c. Course Chiefs will use the templates from the Appendices and the SAT Users Guide for 1-9 above. Course Chiefs will maintain an MLF inventory matrix listing items 1-9 above on the y-axis and the lessons on the x-axis with the intersection showing the date last revised. All components of the MLF will be revised/validated on a yearly basis using the MLF checklists from Appendix O and the SAT Users Guide.

## Chapter 2

Roles and Responsibilities

1. Introduction. FLCs will establish a policy for staff and faculty development. In addition to formal requirements specified in this chapter, schools will tailor additional faculty development to the needs of their school in a Staff and Faculty Development Program (SFDP). Specifically, faculty development programs will center on maintaining proficiency in the formal school faculty ITEs listed in reference (1), as well as include any school house specific training. The faculty development program will also include refresher and/or advanced training in course content; and advanced or emerging topics in curriculum, instruction, evaluation, adult learning and school administration.

2. Faculty Records. All FLCs must maintain records for each faculty member (civilian and military; instructors, curriculum developers, Formal School Manager, and other staff designated for providing formal instruction) documenting completion of required courses and other associated requirements. Faculty records will contain at a minimum:

a. SAT/ORM Indoctrination (or Refresher as required) DL completion certificates.

b. T3S Course completion certificates.

c. Designation letters (e.g. Formal School Manager, Course Chief, Chief Instructor, Master, Senior and/or Basic Instructor).

d. Quarterly Instructor Evaluations (Instructors will be evaluated using a local adaptation of the Instructor Evaluation Checklist, Appendix O-37).

e. All Instructional Rating Forms (IRFs). IRFs (Appendix O-44) will be completed by at least 10% of all students immediately following each lesson and will be maintained by the respective Course Chief.

(1) Include a locator sheet identifying where IRFs are stored.

(2) Other material as required (e.g. Faculty Advisor designations, counseling session documentation, attendance rosters for faculty development training).

(3) Instructor hours.

(a) Platform hour. Time an instructor spends facilitating a period of instruction in a structured learning environment.

(b) Contact hour. Time an instructor/faculty advisor engages students outside of the structured learning environment.

3. Previous Instructor/Curriculum/Administrator Training

a. Primary instructors who have previously completed another service's instructor training course are not required to attend the FSIC. Instructors reassigned to a formal school will be required to attend FSIC again for recertification unless they have been assigned to an instructor billet within

the previous 5 years. Marine instructors at Inter-service Training Review Organization (ITRO) schools may attend another service's local instructor course; however, every attempt will be made to send Marine instructors to the FSIC.

b. Regardless of previous training or education, all personnel in designated curriculum development billets (i.e. Course Chiefs, Academics Officers, military and civilian curriculum developers, TECOM task analysts, Training Command Action Officers) should attend the CDC.

4. Train The Trainer (T3) School. Located at Camp Johnson, NC with a Detachment at Camp Pendleton, CA, T3S provides resident, Mobile Training Team (MTT), and Distance Learning courses for specific billets within Marine Corps Formal Learning Centers.

a. Instructors

(1) Formal School Instructor Course (FSIC): This course provides the knowledge and skill sets required for instructors to succeed in Marine Corps formal schools and detachments. There are three objectives for this course: the preparation of instruction, the delivery of instruction and to conduct after lesson management. Per this Order (MCO 1553.2\_) FSIC is a requirement for all personnel assigned to an instructional billet within TECOM.

(2) Senior Instructor Course (SIC): The SIC is designed to train instructors in enhanced instructional methods and techniques complimenting methods previously received in the FSIC. Instructional methods and techniques include: Guided Discussion, Role Play, Case study, Socratic questioning, Coaching and Scaffolding. Prerequisites for the SIC are; the FSIC (or equivalent), currently assigned to an instructor billet, and commanders recommendation. It is recommended that FSIC graduates attend SIC before their one year mark and have at least six months of instructing experience before nomination to the Senior Instructor Course.

b. Curriculum Management

(1) Curriculum Developer Course (CDC): The Curriculum Developer Course provides the skills required to succeed as a curriculum developer in the Formal Learning Centers. This course includes instruction and practical application in conducting a learning analysis, writing learning objectives, writing exams, writing instructional materials and developing media. Students are also taught the processes associated with developing and generating a POI using the Marine Corps Training Instructional Management System (MCTIMS).

(2) Formal School Manager Course (FSMC): To train Formal Learning Center personnel serving in billets associated with management of Marine Corps' formal schools in compliance with applicable orders, directives and practices. Students are trained on the use of SAT, as well as compliance with this Order (MCO 1553.2\_), Standing Operating Procedures (SOP), an introduction to MCTIMS, Staff and Faculty Development (SFDP), program assessments, and Evaluation Plans.

(3) Formal School Commanders Course (FSCC): The FSCC is currently available as a Distance Learning (DL) product only, at this time. The FSCC is designed for school administrators responsible for the design,

development, implementation, and evaluation of instruction at Marine Corps Formal Learning Centers. The emphasis of this course is on the management and supervision of FLCs in accordance with the SAT Users Guide and applicable directives.

c. Unit Training Managers

(1) Unit Readiness Planning Course (URPC): This course provides the knowledge and skills required for commanders and unit training managers to systematically plan, conduct and assess unit training. This course also includes instruction and practical application in the development of a Mission Essential Task List (METL), conduct of a unit training assessment, development of training plans, letter of instruction (LOI), as well as training processes, procedures and best practices associated with training management concepts in support of the Training and Readiness (T&R) program and the Systems Approach to Training (SAT).

5. Commanding Officer/Director/OIC Responsibilities

a. Identify those FLC personnel required to attend the appropriate T3S Course and ensure they are trained before performing their specific duties. Following the assignment of personnel as a Primary Instructor or Curriculum Administrator/Developer, the Commander has 120 days to ensure the individual's attendance at the appropriate FSIC or CDC course.

(1) Use the appropriate T3S screening checklist to ensure that personnel, prior to attending the required T3S course, have met all prerequisites for that specific course.

(2) FLCs will contact T3S to secure a seat in the required course and initiate a funding request for Marines attending the course via TAD.

(a) If attending the course on TAD orders, personnel assigned to FLCs located east of the Mississippi River, will attend T3S Detachment East located at Camp Johnson, North Carolina.

(b) For FLCs located west of the Mississippi River, to include Hawaii and Okinawa, personnel will attend T3S Detachment West located at Camp Pendleton, California.

(c) Requests for exceptions to this policy will be forwarded to the Director, T3S. Funding for Marines to attend these courses is provided by CG, TECOM (C 464).

(d) Units outside of TECOM must budget and allocate unit TAD funds for personnel to attend these T3S courses.

b. Complete the DL Formal School Commander Course (FSCC) available on the TECOM website at:

<https://www.intranet.tecom.usmc.mil/sites/gtb/sections/tme/default.aspx>

within 30 days of assuming command and prior to attending the annual TECOM Commander's Conference. Coordinating instructions from CG, TECOM will be sent to each incumbent and inbound FLC Commander via separate correspondence.

(1) Executive Officers, SNCOICs, Academic Officers/Chiefs, Chief Instructors, and Operations Officers/Chiefs will also complete the FSCC DL within 30 days of reporting.

c. All Formal Learning Center personnel will complete the SAT (MarineNet course # UT01A0), and ORM (MarineNet course # DI5101A) DL courses within 30 days of reporting.

d. Staff and Faculty Development

(1) Establish and administer a Staff and Faculty Development Program (SFDP) that addresses the specific needs of the school. Upon assuming command, Commanders and Directors must conduct a detailed assessment of the school and revise or tailor the SFDP accordingly. Because the SFDP must be designed and personalized to the strengths and weaknesses of the individual school/command, the construct of the SFDP will vary widely from school to school. At a minimum, the SFDP will address required formal training, new instructor orientation, and continuing professional development for both active duty and civilian personnel. Potential considerations for SFDPs are outlined below.

(a) Required formal training

1. Assign all primary instructors and curriculum developers to the appropriate T3S course early in their assignment; within 120 days of their arrival at the FLC. Submit the appropriate T3S screening checklist with nomination request for faculty attending T3S courses.

2. Require all personnel to complete the required SAT and ORM Indoctrination DL courses (located on MarineNet).

(b) New instructor orientation

1. Orientation seminars. This could include administrative, logistical, and welcome aboard considerations, as well as an introduction to effective teaching methods (building upon FSIC).

2. Mentoring program.

3. Introductory period during which new instructors observe classes.

4. Introductory period during which new instructors assist in instruction prior to assuming lead.

5. Opportunity for peer review of new instructor's teaching prior to instructing students, offering non-threatening, professional, and honest feedback.

6. Requirement for staff review of new instructor's teaching, providing both rigorous peer evaluation and informal certification to instruct a lesson (typical of the "murder boards"). Instructor Evaluation Checklist located in Appendix O-37.

7. Videotaping of presentations or discussions for self-analysis.

8. Validation of the new instructor as a 'certified' instructor.

(c) Continuing Professional Development

1. Sustainment interval/refresher training in the formal school faculty ITEs listed in reference (n).

2. Refresher and or advanced training/education in course content.

3. Advanced or emerging topics in curriculum, instruction, evaluation, adult learning and school administration.

4. Establish a standardized reading list tailored to the needs of each individual school. A list of resources utilized in higher education can be found on the T3S website at:

<http://www.marines.mil/unit/tecom/t3s/Pages/welcome.aspx>

(2) Civilian Employees. Provide professional development for those civilian employees assigned to Marine Corps Formal Schools, PME Schools, Training Detachments or educational institutions. Ensure civilian 17XX series employees attend required TECOM hosted seminars and appropriate T3S courses. Authorization for such training is established in the Government Employees Training Act (Public Law 85-507). Requests for quotas for civilian employees and subsequent seat assignments to Marine Corps formal courses of instruction will be coordinated through the Service Quota Managers, at CG, TECOM (C 4611). The training must be related to the individual's present or prospective responsibilities. FLCs must budget for and fund civilian employee training.

e. POI Submission. Submit POIs to CG, TECOM or CG TRNGCMD as appropriate for review of all new or revised formal courses of instruction in accordance with Chapter 1, Par 4 of this enclosure.

(1) For courses taught at multiple locations, the mirrored schools will submit the POIs simultaneously.

(2) Schools required to execute POIs developed by a designated subject matter proponent or TECOE must revise and submit a site specific CDD with the proponent POI for that school. Upon approval, a CID will then be assigned to the POI that includes the submitting school's school code. For example: All marksmanship ranges across the Marine Corps creating Marksmanship Instructors will have identical Programs of Instruction, except for the location specific data contained in the CDD. This location specific data will be reflected in a location-specific CID for each range, even though the training delivered at the various locations is identical.

(3) For those courses of instruction conducted at other service schools, submit equivalent course documentation and other service CDD created in Microsoft Word or in future revisions of MCTIMS.

(4) Formal course revision is only authorized when an updated POI, along with a cover letter detailing the proposed changes, is approved by CG,

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TECOM, or CG, TRNGCMD. Additionally, course revision can also be authorized via a formal approval letter from CG, TECOM, or CG, TRNGCMD.

f. Master Lesson Files. Maintain an MLF for each lesson taught, containing the required components and checklists in accordance with the SAT Users Guide and Appendix O.

(1) Review all MLFs annually and make required adjustments.

(2) For those lessons containing Interactive Multimedia Instruction (IMI), a student and Instructor Preparation Guide (IPG) for that portion of the lesson must also be maintained in the MLF.

g. Archives. Maintain, at a minimum, an archive of the following course documents (hard-copy from the latest CCRB cycle and electronic copies from the previous two CCRB cycles):

(1) POI approval letter.

(2) Pertinent T&R Manuals.

(3) Course Content Review Board Record of Proceedings.

(4) After Instruction Reports.

h. Assistance. Request assistance from CG, TECOM (C 469/C 4610) for problem areas relating to the design, development, implementation, and evaluation of any course, as well as any problem areas concerning school administration.

i. Student Management

(1) Ensure students meet the prerequisites for attendance of their school as codified in the Target Population Description (TPD) in the POI. If students do not meet the prerequisites, Commanders may return students to their respective command.

(2) Submit class convening rosters, through MCTIMS Student Registrar, to CG TECOM (4611) within five calendar days of the class beginning date.

(3) Submit validated student and class data (rosters, completion rosters, graduation reports, etc.), using the MCTIMS Student Registrar, within seven calendar days of course completion. For MOS producing courses, also enter awarded MOS into Marine Corps Total Force Structure Management System (MCTFMS) within seven days.

j. Joint Instruction/Other Service Schools. Notify CG, TECOM (C 469/C 4610) of any anticipated or proposed changes to a joint/other service school's course of instruction attended by Marines.

(1) Review other service school course data bi-annually to ensure the instruction adequately trains Marine Corps T&R requirements.

(2) Submit the other service school course data along with the same data in Marine Corps CDD format for each other service school course attended by Marines to TECOM ATD/GTD for approval.

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k. T&R Manual Conferences. Provide qualified Subject Matter Experts (SME) who can speak on the behalf of the formal school, PME School, or training detachment commander to participate in the development of Marine Corps individual and collective events during T&R Manual conferences.

l. Course Content Review Boards (CCRB). Plan and conduct CCRBs on all courses at a minimum every two years. Plan and conduct CCRBs within 120 days of the signed T&R Manual for all affected courses. Requests for deviation will be fully justified in an extension request to CG, TECOM or CG, TRNGCMD as appropriate. While the T&R conference, in conjunction with a well executed FLC evaluation plan, garners extensive operating force/supporting establishment feedback on POI inputs (T&R events) and outputs (course, graduates), FLCs should invite SMEs from the operating force/supporting establishment to participate as available in CCRBs.

m. Recommendations. Make recommendations for changes to T&R Manuals or improvements to any Marine Corps programs of instruction, to CG, TRNGCMD (C 47) or CG, TECOM (C 469/C 4610 as applicable) based on chain of command.

n. Operational Risk Management (ORM)

(1) Conduct ORA for all lessons contained in the POI and maintain the ORAW, including the Cease Training (CT) criteria and Cease Training procedures, as part of the MLF.

(2) For training lessons/events that involve risk of injury or death, develop site-specific pre-mishap plan per reference (o). Review and exercise pre-mishap plans annually.

(3) Investigate and report all training related mishaps in accordance with reference (o).

(4) Determine if a course has an ORM risk assessment code (RAC) of I or II. For any course that has an ORM RAC I or II, submit a request (with justification) to CG, TECOM for approval and inclusion to the High Risk Training (HRT) Courses at Formal Schools (enclosure (4)). Note: Generally, any course that involves shooting and moving, leaping from or suspension from a height, the possibility of electrical shock and/or submersion in water should be closely evaluated with a bias towards inclusion in the list of HRT.

(5) Submit Serious Incident Report (SIR) via Chain of Command to CG, TECOM per reference (p).

o. Formal Schools Commander's Course (FSCC). Take DL Formal School Commander's Course (FSCC) within 30 days of assignment.

p. Standing Operating Procedures (SOP). Revise/validate FLC SOP. (Refer to SAT Users Guide, and Appendix O-59 for school SOP checklist.)

q. HRT Category I and II. Commanding Officers/Directors/OICs, Marine Corps Formal Learning Centers with Courses Designated as HRT Category I and II (see Appendix N).

(1) Include initial and residual risk assessment codes and safety controls in the note(s) section of the concept card.

(2) Complete an Operational Risk Assessment Worksheet (ORAW) (see Appendix O-15) using the Risk Assessment Matrix in Appendix N for Marine Corps High-Risk Training Programs for each RAC I or II course and maintain that checklist in the MLF.

(3) Brief all students on cease training procedures per Appendix K.

(4) Verify that all high-risk instructor candidates are screened per enclosure (2).

(5) Designate a HRT Safety Officer (HRTSO) for oversight of all HRT events. See Appendix L for more information on the HRTSO.

(6) Ensure the HRTSO completes the Ground Safety for Marines Distance Learning (DL) course and the ORM Indoctrination DL course prior to assuming duties.

(7) Establish a schedule for the HRTSO to observe and evaluate all high-risk evolutions. See Appendix L for guidance, while referencing and utilizing the HRT checklists available on the Naval Safety Center web page:

<http://www.safetycenter.navy.mil/ashore/trngsafetyprg/index.asp>

(8) Investigate and report all training related mishaps in accordance with reference (o) and (p).

(9) Ensure HRT course prerequisites include safety considerations.

(10) Verify that students meet all course prerequisites prior to commencing training. If students do not meet the prerequisites, Commanders may send students back to their respective command.

(11) Monitor student medical status and establish internal controls to inform instructors of any changes in a student's condition. Students determined to be physically unfit or psychologically unsuited will be removed from training until cleared by qualified medical personnel to return.

(12) Design student critiques that address the following safety related areas:

- (a) Cease Training procedures were explained.
- (b) Lessons on safety were included as applicable.
- (c) Lessons related safety to job performance.
- (d) Emergency action procedures were explained.
- (e) Safety precautions were in place for each event.
- (f) Instructors followed all safety precautions.

(13) Conduct an annual safety review and verify the HRT Category of all courses.

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(14) Establish an instructor proficiency evaluation program that evaluates high-risk instructors in the appropriate instructional environment (classroom and/or field) per Appendix L.

(15) Develop site-specific pre-mishap plans for all high-risk events per reference (o). Review and exercise pre-mishap plans annually.

(16) Provide annual ORM/HRT refresher training to faculty, i.e., mishap reporting, site-specific safety requirements/updates.

(17) Request a periodic safety survey from the NAVSAFCEN (Code 48). The frequency of these surveys will not exceed two-year intervals. Direct liaison is authorized.

6. Formal School Manager (FSM)

a. Each FLC will have a Formal School Manager (FSM) who assists the CO/OIC/Director in the execution of the provisions of this Order. The FSM can be a collateral duty for the Executive Officer, Operations Officer, Academics Officer/Director, Deputy Director, Chief Knowledge Officer, Academics SNCOIC, Chief Instructor, etc., or in the case of larger FLCs, a separate billet. The FSM will be designated in writing by the Formal Learning Center Commander/OIC/Director.

b. The FSM will maintain a desktop turnover binder to include, at a minimum, the FSM designation letter, a printed or electronic copy of each relevant T&R Manual, a printed copy of all approved POIs to include the CG approval letter for each, designation letters of one Course Chief per POI, copies of at least the last two ROPs associated with each POI, results of any CGIP inspections conducted within the previous three years, a printed copy of this Order, and a printed or electronic copy of the SAT Users Guide.

7. Academics Section. Each FLC will have an Academics Officer. The Academics Officer/Director is responsible for all FLC POIs, to include POI design, development, submission, evaluation, and maintenance. The Academics Officer is responsible for planning, preparing, facilitating, and consolidating CCRBs along with submission of POIs to higher headquarters. If not designated as the FSM, the Academics Officer/Director will be designated in writing by the FLC Commander/OIC/Director, and will assist the FSM in execution of the provisions of this Order. Other Academic related billets within the FLC, manpower permitting, that could be part of the Academics Section include: Assistant Academics Officer/Director, Curriculum Administrator/Developer, Course Chief(s), POI/Course Manager, as well as a Testing & Evaluation Officer/Director.

8. Curriculum Administrator/Developer

a. Marine, civil servant, other service member, or civilian contractor who conducts the analysis, design, develop, and evaluate phases of the SAT process for each POI within the FLC.

b. Each POI will have at least one curriculum administrator/developer but not more than two, except in cases where a CGIP AIRS 400 formal school inspection has determined the need for additional curriculum administrators/developers for a course to be mission capable.

c. Personnel assigned as a curriculum administrator/developer will attend the Curriculum Developer Course (CDC).

9. Course Chief. COs/OICs/Directors will assign in writing the most qualified personnel as Course Chiefs. Course Chiefs will be drawn from the assigned instructors and are responsible for the maintenance of course documents and the conduct of a specific course. As instructors, Course Chiefs will also be expected to perform platform instruction albeit with a reduced course-load so they may fulfill their duties as Course Chief. A Course Chief will be assigned for each POI at a FLC.

a. Billet Requirements

(1) Senior or Master Instructor in accordance with the minimum requirements established by TECOM.

(2) FSIC and SIC/AIC graduate.

b. Course Development. Course Chiefs will be the primary advocates for their respective POIs. Course chiefs should work closely with the school Academics Officer/Director and resource manager in the performance of their duties. Course Chiefs are responsible to coordinate all aspects of each course iteration, to include the scheduling of classes, instructors, After Course Reports, and all course associated requirements.

c. Course Records. Course Chiefs will maintain the following records in Course History Folders for their assigned course (unless otherwise specified, records should be maintained for the time period dating back to the last CCRB):

(1) Two-year plan outlining T&R Manual Revision, POI submission, MLF completion, convening of CCRB.

(2) ROPs from at least the last two CCRBs conducted.

(3) Observation, Environment, and Safety Checklists (Appendix O) will be updated by the Course Chief for each MLF annually.

(4) Instructor Qualification Roster showing which instructors are qualified/certified to instruct which lessons (at a minimum, instructors will observe the lesson once and be evaluated giving the lesson by the Course Chief prior to being qualified to instruct the lesson to students). This roster must be routinely updated based on instructor flow.

(5) After Instruction Report (Appendix O-52) summarizing Instructional Rating Forms (Appendix O) for each course iteration. (Instructional Rating Forms will be completed by at least 10% of all students immediately following each lesson.)

(6) Post-Graduate Surveys (refer to Appendix O-55) conducted via mail, email, phone conversation, electronically via online survey tools, or in person. Surveys should be maintained until rendered obsolete by the next CCRB for the affected course.

(7) Course Structure (containing at a minimum: Lesson Designators Lesson Titles and time allotted, each from the pertinent Concept Card.)

(8) Training Schedules for each course iteration.

(9) After Instruction Report summarizing all Exam Rating Forms (Appendix O-45) for each course iteration. (Exam Rating Forms will be completed by at least 10% of the students immediately following each exam.)

(10) After Instruction Report summarizing End of Course Critiques (Appendix O-46) from all students for each course iteration.

10. Testing Officer/Director. The Testing Officer/Director is responsible for oversight of all testing procedures as well as evaluation of testing data as part of the Evaluation Phase of SAT.

11. Primary Instructor

a. Marine, civil servant, other service member, or civilian contractor who teaches a lesson as designated by the POI and conducts the implement phase of the SAT process. Primary Instructors will assist the Curriculum Developer with development and maintenance of MLFs.

b. A Primary Instructor is a Subject Matter Expert (SME) in the subject being taught.

c. Instructor hierarchy is as follows:

- (1) Basic Instructor
- (2) Senior Instructor
- (3) Master Instructor

d. Primary instructors will complete the SAT and ORM DL courses and attend the Formal School Instructor Course (FSIC), as well as any other required course(s).

e. Instructor Operational Risk Management Responsibilities

(1) Review all course materials to include the ORAW for each training event and ensure all personnel are briefed on the risk factors, safety controls, cease training criteria, and cease training procedures.

(2) Conduct time-critical ORAs as required and report findings to school administrators via the After Instruction Report (AIR).

(3) Cease training when the risk to personnel or equipment exceeds the pre-determined acceptable level.

(4) Complete the proper mishap report in the event of a mishap.

12. Assistant Instructor

a. Marine, civil servant, other service member, or civilian contractor who supports an academic lesson (e.g. small unit leader for students, supervises practical application, conducts coaching or demonstrations, assists with range safety) under the supervision of a Primary Instructor. Assistant Instructor will not perform primary platform instructor duties.

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b. Assists in conducting the implement phase of the SAT process.

c. Assistant instructors will complete the SAT, ORM, and Basic Instructor Skills Course (BISC), available on the TECOM website:

<https://www.intranet.tecom.usmc.mil/sites/gtb/sections/tme/default.aspx>

d. Assists Primary Instructor in the performance of all ORM responsibilities.

### 13. High Risk Training (HRT) Instructor Responsibilities

a. Complete the SAT and ORM Indoctrination DL courses and the FSIC.

b. Complete the ORAW Checklist for Marine Corps High-Risk Training Programs for each RAC I or II course and maintain that checklist in the MLF.

c. Review all course materials to include the ORAW for each training event and ensure all personnel are briefed on the risk factors, safety controls, cease training criteria, and cease training procedures.

d. Conduct time-critical ORAs as required and report findings to school administrators via the After Instruction Report (AIR).

e. Cease training when the risk to personnel or equipment exceeds the pre-determined acceptable level.

f. Assist the HRTSO in developing and reviewing the pre-mishap plan.

g. Assist the HRTSO in completing the proper mishap report in the event of a mishap.

### 14. High-Risk Training Safety Officer (HRTSO) Responsibilities

a. Complete the two week Ground Safety for Marines course prior to assuming duties.

b. Review all courses with ORM RAC I or II annually.

c. Review the completed ORAW Checklist (Appendix O-30) for Marine Corps High-Risk Training Programs for each RAC I or II course and maintain that checklist in the MLF.

d. Review all training mishaps to determine if training procedures, safety precautions, pre-mishap plans, or training devices caused or contributed to the mishap.

e. Notify the command's safety office of all mishaps to ensure mishap reporting and recording is initiated per reference (o).

## Chapter 3

### Evaluation

1. Introduction. The goal of evaluation in any FLC is to determine the effectiveness of a course. FLC Commanders/OICs/Directors are required to conduct course evaluations on an ongoing basis as part of the school's overall evaluation plan. The evaluation plan is based on a two-year cycle and coincides with the T&R and POI battle rhythm.
2. Purpose. The purpose of evaluation is to identify potential improvements to courses by:
  - a. Validating course content.
  - b. Assessing student achievement.
  - c. Measuring graduate performance.
  - d. Evaluating instructor performance.
3. Commanding General's Inspection Program (CGIP). FLCs will be inspected by the TECOM CGIP every two years in accordance with reference (q) and the AIRS 400 checklist (Appendix I). Current AIRS checklists are updated regularly and are available through the IGMC Marine Corps web site at:

<http://hqinet001.hqmc.usmc.mil/ig>

4. Continuous Evaluation. Evaluation is continuous throughout all phases of the SAT process. Evaluations are conducted in accordance with reference (b) and the SAT Users Guide. FLCs conduct evaluations on an ongoing basis by collecting data from:
  - a. Students (Instructional Rating Forms, End of Course Critiques).
  - b. Graduates (Post Graduate Surveys).
  - c. Supervisors, of recent graduates (Post Graduate Supervisor Surveys).
  - d. Marine Corps Center for Lessons Learned (MCCLL).
  - e. Course Instructors (After Instruction Report).
  - f. FLC staff and faculty (AIRs, IRFs, other data inputs as required).
  - g. Operating Force (Field Surveys).

Note: Designated Course Chiefs will consistently monitor MCCLL information pertaining to their assigned course.

5. Course Content Review Board (CCRB). The CCRB is not the formal school evaluation plan in and of itself. Rather, it is the conclusion of a two-year process to collect, evaluate, and provide input data to the formal school evaluation process. The CCRB is not a mini T&R review conference. The majority of discussion and deliberation should be on agenda items generated by data inputs. The above referenced data sources, in addition to changes to

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the T&R Manual from a valid T&R conference, along with initiatives from the advocate, will enable school commanders to make required changes to the course. This data becomes input to a CCRB. The purpose of the CCRB is to review and validate course content using data inputs from the formal school evaluation process. CCRBs validate that the proper T&R events are being used, and completes the Formal School Evaluation Plan for a given course.

a. CCRBs will occur within 120 calendar days after the T&R Manual is signed, yet prior to the deadline for submission of POI(s). FLCs are required to submit POIs to either GTD Ops or ATD Ops for staffing within 120 days of the date of the signed T&R Manual. POIs will be submitted by the respectively designated FLC Formal School Manager to either GTD or ATD Ops section via the following email address: TECOM.GTB.OPS@USMC.MIL or TECOM.ATB.OPS@USMC.MIL for appropriate staffing.

(1) If a FLC is incapable of meeting the timeline above, the FLC will submit a waiver request with justification, along with a plan of Action and Milestones (POA&M) detailing how the FLC will expeditiously meet the CCRB requirement.

(2) Waiver requests with justification and POA&M will be submitted to either ATD Ops or GTD Ops.

b. A CCRB will be conducted for each course with supervision from the Academics Officer. CCRBs will be conducted with guidance from TECOM.

c. Record Of Proceedings (ROP). The results of the CCRB are captured in the ROP and are used to aid revisions of POIs.

(1) The CCRB ROP will accompany the submission of the POI as support and justification of the contents.

(2) The CCRB ROP will include course revision data listed by lesson designator, lesson title, and lesson time expressed in hours. The previous and current lesson designators and hours are listed (when applicable) and rationale is provided for each change to these items. It should also identify any required resource revisions in CDD items 21, 22, and 23.

(3) An example CCRB ROP may be found in Appendix G.

d. Formal CCRBs are planned and conducted, at a minimum of once every two (2) years, by the FLC. Representatives from the following organizations should be invited to attend CCRBs:

(1) Operating Force.

(2) Occupational Field Sponsor.

(3) ATD/GTD Task Analyst (to the maximum extent possible).

(a) Task Analyst is a non-voting member in the CCRB.

(b) Will advise CCRB Chair on matters pertaining to conduct of the CCRB.

(c) If the Task Analyst is present, they will produce an After Action Review (AAR) to TECOM GTD Ops within 5 working days of their return. The AAR is the Task Analysts opinion of the board and issues of concern to higher headquarters, and not a duplicate of material contained in the ROP.

e. CCRB Chair. The designated Course Chief, under the guidance of the Formal School Manager, will be the CCRB chair and will ensure the CCRB is conducted in a fair and equitable manner.

f. Consolidated CCRBs. For courses taught at multiple locations, a consolidated CCRB will be convened to ensure curriculum content remains consistent between course locations.

g. Funding. School O&M funds are normally used to fund travel to CCRBs. Schools must plan and budget appropriately.

6. FLC Evaluation Report (FLCER). Two months prior to a T&R Conference, FLCs are encouraged to create a report summarizing the result of evaluations associated with every CID. Once created, this report will greatly benefit the T&R Conference, and will assist attendees in reviewing ITEs in the light of the results contained in the FLCER report (example located in Appendix F). This report should contain:

a. Assessment by the OPFOR of FLC's transfer of learning.

b. Assessment by the OPFOR of the relation of FLC product to the mission of the gaining unit.

c. Assessment by the OPFOR of gaps in training and education, specifically:

(1) Individual events not identified in the T&R nonetheless required by the mission.

(2) Individual events required to be trained at the FLCs but identified as MOJT in the T&R Manual.

(3) Individual events assigned to the FLC but irrelevant to a unit's mission.

7. Battle Rhythm. Intent of CG, TECOM is for T&R Manuals and POIs to be updated every two years. To standardize and synchronize these requirements, see reference (e) for Ground T&R Manuals or reference (f) for Aviation T&R Manuals. The following generic battle rhythm is promulgated:

- T&R Conference: Approximately one week in duration.
- Up to 60 days after the end of the T&R Conference, or during the conference (if possible), conduct complete review of T&R events and entry of revisions into MCTIMS T&R Development Module.
- NLT 20 days after event entry in the T&R Development Module: complete draft T&R Manual and staff for general review.
- NLT 30 days after draft is posted for review: edit draft manual based on staffing comments from OPFOR, advocate and supporting establishment.
- 15 days after staffing completed: complete final draft of T&R Manual.
- Approximately 5 days after formal draft is complete: final review and approval/signature by CG TECOM.

- After CG TECOM signature: submission of the signed T&R Manual to HQMC Administration and Resources Management Division for formal publishing of manual; simultaneous posting of the signed manual in pdf on TECOM GTD website.

- 120 days after T&R Manual is signed: Conduct a Course Content Review Board (CCRB); submit all POIs, unless extension has been granted, as described above.

- 60 days prior to next T&R conference: prepare FLC Evaluation Report, provide to Task Analyst.

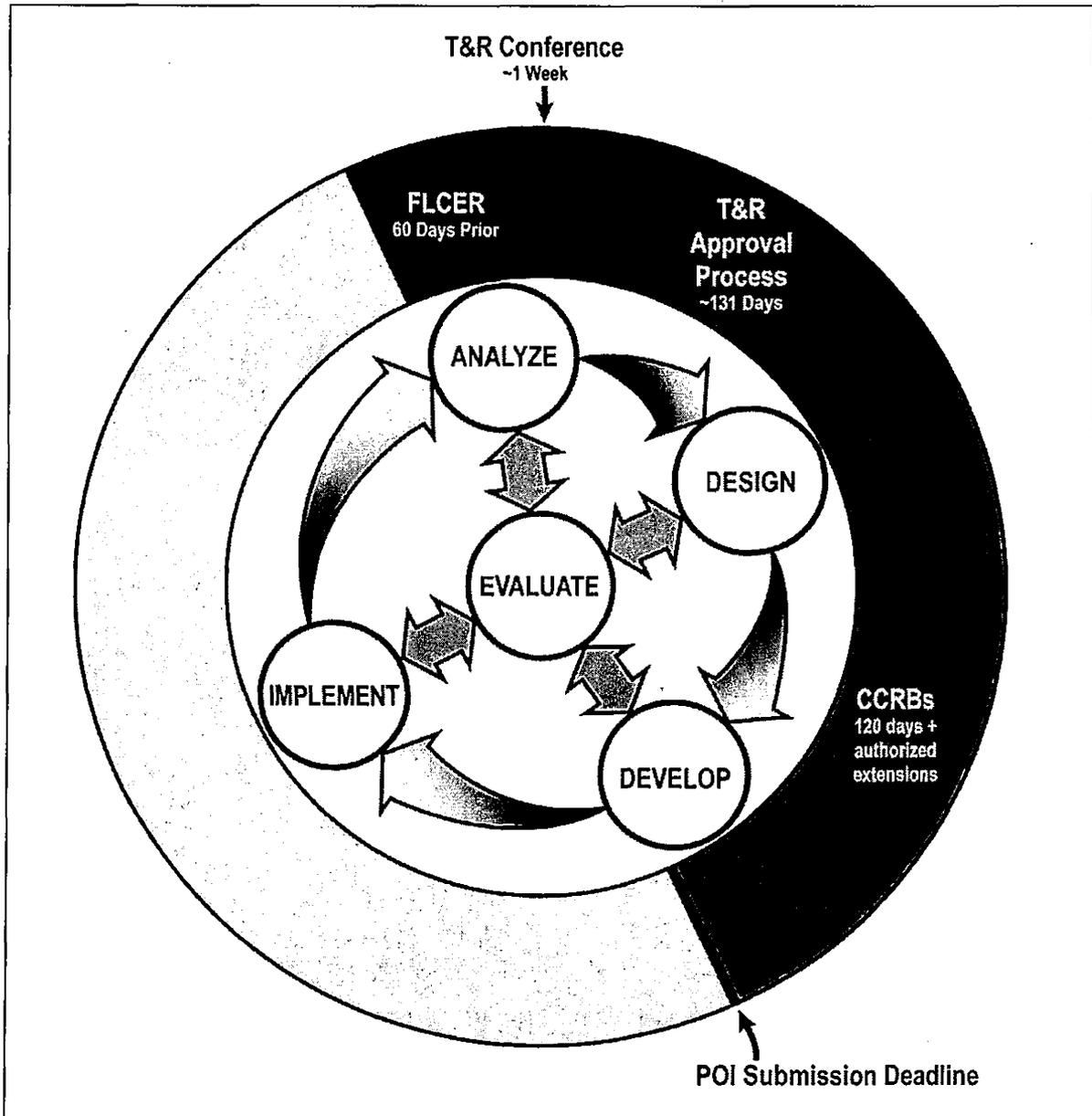


Figure 3-1. 2 Year Battle Rhythm

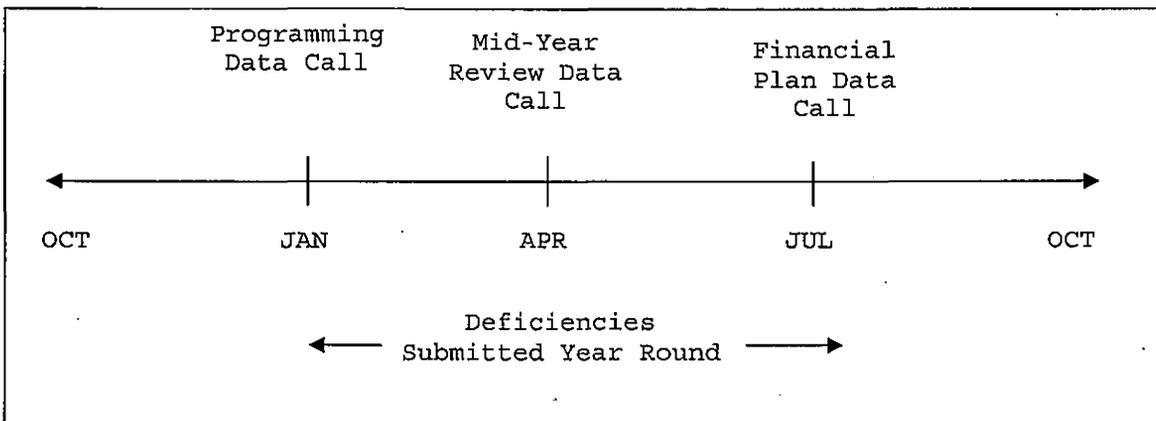
Chapter 4

Formal School Resources and Requirements

1. Background. The following information is provided to enable Formal Learning Centers to better participate in the programming, budgeting, and resourcing processes within TRNGCMD and TECOM. While POIs are developed, submitted, and approved continuously throughout the year, funding is only allocated through specific programming and budgeting initiatives tied to specific dates within the calendar year. Although a Commander/OIC/Director may request resources at any time throughout the year, a basic understanding of the PPB&E (Planning, Programming, Budgeting, and Execution) process will better enable him/her to acquire the necessary resources to adequately support both existing and future POIs.

a. The FLC financial plan incorporates Planning, Programming, Budget, and Execution (PBBE). The input to the Financial Plan data call will be inclusive of not only the previously established baseline, but also all requests and data call inputs that will effect the next fiscal year.

b. Data Submission Timeline



2. Programming

a. TECOM staff and subordinate commands will use the following procedures for submitting budgets and engaging the Program Objective Memorandum (POM) process.

(1) Programming activities are annually conducted with the development of the service Program Objective Memorandum (POM).

(a) POM build year (annually). The total program is evaluated and there are opportunities to compete for additional funding to pursue new programs or activities.

(2) Programming data calls will normally be issued during the end of the 1<sup>st</sup> Quarter/beginning of the 2<sup>d</sup> quarter by the TECOM G-8. Commanders and activity heads will develop and identify initiatives detailing additional funding required to execute their mission.

(3) G-8 will issue guidance and provide the formats for completing the programming data calls. Data elements will be similar to those required for budget development.

(4) FLCs will identify funding required by course, per approved POI. FLC overhead costs must be tied to one and only one course- costs must not be duplicated in the data call (i.e. one instructor may teach multiple courses, but should only be tied to one course for accounting purposes).

(5) The data will be by category as follows:

- (a) Civilian labor.
- (b) Staff TAD.
- (c) Administrative supplies (including fuel).
- (d) Printing/Reproduction.
- (e) Annual contracts (copier, etc).
- (f) Replenishment/replacement of parts and materials.
- (g) Equipment, not including course-specific training equipment.
- (h) Budget (current year +1) fiscal year deficiencies.

### 3. Budget and Financial Plan Submissions

a. Annual Financial Plan. The annual Financial Plan is the vehicle for all of TECOM and TRNGCMD to identify phasing plans (allocation and obligation) and currently known mission related funding deficiencies for the budget year. Annual Financial Plans are submitted to TECOM Comptroller as follows:

(1) TECOM Major Subordinate Commands (MSCs) will submit their financial plan information directly to the TECOM Comptroller (to include subordinate unit requirements): MCRDs Parris Island and San Diego, MAGTFTC, and EDCOM.

(2) TRNGCMD Formal schools and Marine Detachments will submit their financial plan information directly to the CG, TRNGCMD G7.

(3) TECOM headquarters divisions, branches, and activities forward financial plans directly to TECOM Comptroller.

b. Funding Deficiencies. All TRNGCMD elements will use the format in Appendix P to identify deficiencies. Unfunded deficiencies will be submitted to TRNGCMD Comptroller as follows:

(1) During the annual Financial Plan data call, identified deficiencies will reflect collective deficiencies on previously approved POIs that cannot be funded internally by the FLC. To this end, all FLCs will review all CDDs when preparing their annual submissions.

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(2) Via an Unfunded Deficiency Request (UDR) as needed during the fiscal year, when additional/emerging requirements are identified to support an approved Proof of Concept CDD or POI.

(3) During the TECOM annual Mid-Year Review (MYR) process for all funding deficiencies that cannot be funded internally.

(4) All Formal Learning Centers must understand that the programming (POM/PR) process is the primary vehicle/method for obtaining significant additional permanent funding resources.

(5) Other deficiencies

(a) Manpower. T/O deficiencies will be addressed through the Marine Corps Total Force Structure System (MCTFSS). All T/O change requests will be submitted to CG, TECOM via TECOM GTD OPS and the G-1 for TECOM MSCs, via EDCOM for EDCOM MSCs, and via TRNGCMD for TRNGCMD MSCs.

(b) Logistic Support. For Formal Learning Centers located at MCB's Camp Lejeune and Camp Pendleton, logistic support will be per the respective memorandums of agreement (MOA) between TECOM and each base. Requests for T/E equipment will be submitted as appropriate to CG, TECOM or CG, TRNGCMD via TECOM GTD OPS and the G-4.

(c) Facilities. Facility matters are the responsibility of the host installation. Unresolved or urgent issues, however, will be coordinated with the respective G-4. The G-4 will assist in ensuring facilities requirements are coordinated with Marine Corps Bases Facility offices.

(d) Ammunition. Recommended changes to ammunition resource requirements will reflect approved POIs and will be submitted to CG, TECOM via the G-4.

4. Additional Support Requirements

a. The CDET and the Director, MCI will develop, publish, and administer Distance Learning (DL) products for MOS training and PME as directed by CG, TECOM. These materials will be based on T&R events developed for a specific Military Occupational Specialty (MOS) or PME course. Further guidance for DL product development is contained in reference (r).

b. School Commanders that require Combat Camera equipment support must coordinate and submit written request for support and resources from local Combat Camera personnel.

(1) When requirements cannot be filled by the local Combat Camera unit, that Combat Camera unit will request assistance from CG, TECOM (C 468).

(2) For FLCs not co-located with Marine Corps Combat Camera personnel, requests for assistance will be forwarded to the host Commander in accordance with appropriate inter-service agreements and other governing directives.

c. When training and education support requirements cannot be filled by in-house Marine Corps or host command assets, such as learning devices,

courseware, or specific technical expertise, it may be necessary to request contract support from organizations external to the Marine Corps.

(1) FLC commanders will forward requests for contractor support, with detailed justification, to CG, TRNGCMD G-7, or CG, TECOM (C 464).

(2) Courseware developed by contractors, including Computer Based Training (CBT), must be developed under the guidance of references (b) and (r).

d. World Wide Travel (WWT) is authorized in accordance with MARADMIN 178/10 contained in reference (s). Additional issues pertaining to WWT should be directed to the G-3, TRNGCMD.

5. TRNGCMD Formal Learning Centers. All TRNGCMD FLCs are identified in Appendix J.

## Chapter 5

### Administration and Oversight

1. Introduction. This section provides an overview of current web-based management tools as well as critical guidance for Operational Risk Management (ORM) and the safeguarding of sensitive information.

2. Management Tools

a. Marine Corps Training Information Management System (MCTIMS). MCTIMS is the primary tool for planning, developing, resourcing, executing and evaluating training in the Marine Corps. All Marine Corps FLCs are directed to use applicable MCTIMS functionality in the performance of schoolhouse functions. MCTIMS is continuously evolving in its capability, thus personnel should identify MCTIMS shortfalls to the Training Management and Evaluation (TMEB), Ground Training Division (GTD) via the process outlined in this chapter. Commercial-Off-The-Shelf (COTS) technology for training capability is not authorized without prior written consent from CG TECOM (GTD). This directive is not designed to restrict schoolhouse capability, but rather to ensure the maximum capability is integrated into MCTIMS to satisfy both current and future learning requirements. While COTS capabilities exist to satisfy piecemeal requirements within the Training continuum, MCTIMS is being developed to integrate all T&E information to ensure a comprehensive approach to all phases of the Systems Approach to Training (SAT) process. More than a Learning Management System (LMS), MCTIMS will fully integrate the entire training and education continuum of both individual Marines and Marine Units from the Fire Team to the MEF. Where needed, it will integrate with other USMC Enterprise systems and other TECOM systems to execute day to day training and education as well as long range planning in accordance with the SAT process.

(1) Use Appendix D for a System Change Request (SCR) or Production Trouble Report (PTR) submission. Appendix D is the primary means for resolving problems and submitting changes for any MCTIMS module. Management of SCR/PTRs is the responsibility of CG, TECOM (C469TMEB).

(2) FLC Commanders/OICs/Directors will use the MCTIMS Student Registrar Module for enrollment and reporting of course attendance, attrition, and graduation (see Enclosure 3 for Formal School Seat Coordinating Instructions). The following actions will be completed:

(a) Class Convening Rosters for each class will be submitted within MCTIMS within 5 calendar days of the class beginning date.

(b) Class Completion Rosters will be validated within MCTIMS within 7 calendar days of the class ending date.

(3) The MCTIMS Student Management module provides student tracking based on the unit hierarchy structure used for formal courses/classes matching the organizational structure of the schoolhouses within Student Registrar. There are numerous pre-defined rosters and reports built within the application. In addition, there is the capability to customize rosters and reports. The following are a few actions that can be completed within Student Management:

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(a) Morning Report - status tracking (i.e. sick call, limited duty, etc.).

(b) Counseling and test scores mapped to the Student Evaluation application.

(c) Transfers - ability to move students within the schoolhouses  
Sport Medicine Injury Prevention (SMIP) - ability to track injuries.

(4) The MCTIMS Curriculum Management Module is used to document the design and development of an entire course from receipt of Training and Readiness Events, which become Terminal Learning Objectives, through production of the Program of Instruction (POI). The use of this module is mandated for the production of Marine Corps POIs and Proof of Concept CDDs.

(5) The MCTIMS Student Evaluation Module is a tool for evaluating students as well as drawing conclusions on the instructional environment and the transfer of learning occurring within the school. The Student Evaluation Module will be used by FLCs to the fullest extent.

(6) Class schedules for a course of instruction will be submitted via the MCTIMS Student Registrar Scheduling Wizard by 1 June each year. Class schedules are based on the personnel input figures contained in the current Training Input Plan (TIP) and will agree with the approved POI.

(a) Inability to provide a class schedule that meets the planned input figures of the TIP must be fully explained by FLC Commanders/Directors to CG, TRNGCMD (C47).

(b) Adjustments to approved class convening dates of one week or less will be approved by FLC Commanders/Directors; however, notification of changes and explanation of the conditions surrounding the change must be made to CG, TECOM (C 4611).

(c) In the event a course must be extended beyond the normal length due to reasons outside the control of the school, (i.e., natural disaster, facility problems, etc.), the school will contact CG, TECOM (C 4611/C 464) and provide an impact assessment.

(7) Class Cancellation. A FLC may not unilaterally cancel a class, regardless of circumstance, without prior approval. For FLCs subordinate to CG, TRNGCMD, cancellation requires the approval of CG, TRNGCMD (C 47G3). For FLCs directly subordinate to CG, TECOM, cancellation requires CG TECOM (C 4611) approval.

(a) Prior to submitting any class cancellation request via the MCTIMS Student Registrar Scheduling Wizard, a request from the FLC must be submitted, including justification for cancellation, estimate of the FLCs ability to meet the annual TIP requirement, while listing courses of action/mitigation measures.

(b) Cancellation Request Submission. Course cancellation requests must be signed by the FLC commander/OIC; in the absence of the commander/OIC, the letter may be signed By Direction, by the Executive Officer or Formal School Manager.

1. For Marine Corps administered entry-level courses, no later than (NLT) 45 days prior to the class report date, submit the class cancellation request letter to CG, TRNGCMD (ATTN: TRNGCMD G-3).

2. For Marine Corps administered skill progression and skill enhancement courses, requests must be submitted NLT 15 days prior to the class report date.

(c) Cancellation Request Routing.

1. TRNGCMD Subordinate FLCs. Submit the class cancellation request via CG, TRNGCMD (C 47G3) to CG, TECOM (C 4611). For specific guidance refer to reference (t).

2. TECOM Subordinate FLCs. Submit the class cancellation request to CG, TECOM (C 4611).

(d) Upon receipt of the class cancellation request, the request will be staffed to validate the justification and coordinate with appropriate student requirement sponsors. When validation is completed and the cognizant CG approves in writing the cancellation, TECOM (C 4611) will take action to cancel the class in MCTIMS Student Registrar.

(e) Additional Administrative Requirements.

1. Student Notification. Once a class cancellation has been approved, yet before TRNGCMD (C 47G3)/TECOM (C 4611) can cancel a class in MCTIMS Student Registrar, the FLC must cancel all student registrations for the class in Student Registrar. Cancelling a student's registration carries with it the obligation for the FLC to notify the student, and their parent unit, of their registration cancellation due to class cancellation.

2. Worldwide TAD (WWTAD). For students who have requested TECOM WWTAD funding to attend a cancelled class, the funding requestor must cancel the student's WWTAD funding request through the Marine Corps Enterprise IT Services (MCEITS). This is imperative to free the funds obligated to fund travel for the cancelled class for further WWTAD use.

b. Marine Sierra Hotel Aviation Readiness Program (M-SHARP). M-SHARP is the training management software for scheduling and logging aviation T&R events, comparing logged data to community readiness metrics, and formatting readiness data within T&R Program Manual guidance. M-SHARP captures range utilization, ordnance expenditures, required target sets, flight hour allocation and execution of fiscal monitoring and budgetary purposes. M-SHARP provides unit commanders and higher headquarters with real time data of Combat Flight Leadership, crew training Status, unit instructor status and individual aircrew flight hours. M-SHARP assists unit commanders in calculating unit readiness for reporting in Status of Resources and Training (SORTS) or Defense Readiness Reporting System (DRRS).

3. Safeguarding Protected Personal Information (PPI)

a. MCTIMS is an enterprise system that contains information on Marines, Civilians and other service personnel. PPI is any information or characteristics that may be used to distinguish or trace an individual's identity, such as their name, Social Security Number (SSN), or biometric

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data. MCTIMS goes to great lengths to protect the PPI information contained within the system. All users of MCTIMS should ensure that adequate safeguards are implemented and enforced to prevent misuse, unauthorized disclosure, alteration, or destruction of PPI in accordance with reference (u).

(1) All users of MCTIMS must safeguard PPI information to the highest extent possible. It is expected that all users of MCTIMS shall adhere to the following guidance:

(a) Access PPI related information in MCTIMS only when needed. Even though authorized users may have access to complete PPI information, they should only access this information only as their job/billet requires.

(b) Reduce and/or eliminate localized copies or duplication of MCTIMS PPI data; also known as PPI Data at Rest. In the performance of their duties, some MCTIMS users require the capability to download (export) data from MCTIMS. Any downloaded or exported PPI data from MCTIMS must be safeguarded against unauthorized access or spillage. In an effort to mitigate the possibility of spillage or unauthorized access, it is unauthorized for any MCTIMS user to maintain localized duplicate MCTIMS data on a personal computer or share with other personnel MCTIMS data. Any localized copy of MCTIMS data on a personal computer is considered as "PPI Data at Rest" and is prohibited. If MCTIMS users are required to download (export) MCTIMS data to a local personal computer in an effort to produce ad-hoc reports, after printed copies of the reports are generated, the downloaded (exported) data must be deleted. This also applies to PPI data that may be imported into MCTIMS. Any PPI data that is to be imported into MCTIMS (e.g. Scantron Data File) must be deleted from the local computer after successful import into MCTIMS. The goal is to keep all PPI data within MCTIMS to reduce and or eliminate all PPI data from personal computers.

(c) Any user who prints a report from MCTIMS that contains PPI information is responsible for the safeguarding of said reports. Whenever possible, users must select the report with the least amount of PPI information. For example, when academics personnel generate the test results report within the Curriculum Management and Development Module, academics personnel have the option to remove, display the last four digits, or display the entire SSN on the report. Academics personnel should avoid using the full SSN altogether, however if proper identification of a score to a student requires SSN validation, the academics personnel should use only the last four digits of the SSN. Academics personnel should never use the entire SSN to identify a student on a printed report. When printed reports are no longer required, they must be shredded thereby rendering the information contained on the report unusable by unauthorized personnel.

#### 4. Training Safety

##### a. Operational Risk Management in the Formal Learning Centers

(1) Operational Risk Management (ORM) is a process that enables Commanders to plan for and minimize risk while still accomplishing the mission. FLC Commanders must comply with the process detailed in references (i), (j), (o), (p), (v) and (x) when designing, developing, implementing, and evaluating program of instruction. The CG, TECOM retains the responsibility for oversight of ORM in the Formal Learning Centers and detachments and for

ensuring ORM considerations are addressed during the analyze phase of the SAT process.

(2) All School and Detachment Commanders will apply ORM during the Design, Develop, Implement, and Evaluate Phases of the SAT process. ORM requirements for training will be built into the curriculum during the Develop Phase. An Operational Risk Assessment (ORA) will be conducted for each lesson in the POI and the associated ORM tools will be incorporated and reviewed in the Master Lesson File (MLF) annually. Using Appendix F and G, the commander will conduct a risk assessment and determine cease training criteria and procedures for each lesson. During the Implement Phase commanders must ensure proper safety controls are in place to minimize the risk of injury or loss of life. Additionally, all personnel must be briefed on, and understand, the Cease Training criteria. ORM related measurements must be incorporated in both internal and external course evaluations. Lessons learned from student and supervisor feedback captured during the Evaluate Phase are key inputs for refining the curriculum and instruction.

(3) All lessons will have a current and signed Operational Risk Assessment Worksheet (ORAW) located in the MLF. The ORAW will be updated based on changes that impact the overall risk to injury, loss of life, or significant damage to equipment.

(4) A lesson ORAW will identify safety hazards and record safety controls, Cease Training criteria, and Cease Training procedures.

(5) ORAWs are critical and shall be updated, at least annually, based upon complete reviews of the lesson. Any changes to the ORAW will be incorporated into the associated lesson.

(6) All Formal Learning Centers faculties will complete the approved Marine Corps ORM Indoctrination DL course. Completion of the MarineNet DL course combined with the ORM instruction provided in the resident T3S courses will enable faculty to fully institute the ORM process in their schools.

b. ORM Process Training in Formal Learning Centers

(1) Entry-Level Primary MOS Courses. Commanders will train all entry-level students in Primary MOS courses to apply the ORM process to both on-duty and off-duty events. The training may be integrated within lessons; may be presented as stand-alone, ORM-specific "lesson purpose" period of instruction using TECOM/TRNGCMD or locally prepared training materials; or may be accomplished by having students complete the Marine Corps' distance learning course for ORM before graduation.

(2) ORM Prior to Liberty. Commanders will provide liberty-specific Force Preservation ORM training to students and staff prior to commencing special liberty periods of 72 hours and greater. When feasible, the training will include a practical exercise requiring students and staff to complete an ORAW for their planned activities, and the worksheets will be reviewed by the instructor or unit leader. CG, TECOM maintains a standardized ORM class for use by all schools, but local modification is at the discretion of the commander.

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c. High Risk Training (HRT) in the Formal Learning Center. To ensure Marines are ready for combat, the Corps must conduct physically challenging, demanding, stressful, and at times, dangerous training.

(1) The purpose of this HRT policy is to reduce the risk of death and serious injury to the lowest possible level during training and to provide the necessary resources to address training injuries should they occur.

(2) HRT is defined in the Formal Learning Center setting as:

(a) Basic or advanced individual or collective training, essential for preparing Marines and units for combat, that exposes students and instructors to the risk of injury, illness, death, or permanent disability; or,

(b) Property damage, damage to national or service interests, or degradation to efficient use of assets *despite the presence of and adherence to proper safety controls.*

(c) All courses shall be screened for HRT and assigned a code using the ORM Risk Assessment Codes (RAC). The designation and validation of ORM RAC I or II require the identification and allocation of additional resources to mitigate identified training risks. For a course to be designated as High Risk (ORM RAC I or II), commanders shall submit justification to CG, TECOM for approval. The CDD portion of the POI must reflect additional requirements and resources needed for courses with identified RAC I or II.

(3) The planning and execution of all training, to include HRT, shall incorporate ORM to minimize risk while providing the realism needed to meet operational requirements. To aid in this effort, several HRT checklists are available on the Naval Safety Center web page:

<http://www.safetycenter.navy.mil/ashore/trngsafetyprg/index.asp>

(4) To support the FLC HRT program the Commander will assign, as a collateral duty, a HRT Safety Officer (HRTSO). Depending on School/Unit size, the Commanding Officer/Director/OIC may need to appoint more than one HRTSO. The HRTSO functions as the Officer's/Director's/OIC's resident expert for all aspects of HRT events. The HRTSO is responsible for ensuring the ORM process is fully implemented to minimize risk during all HRT. Additionally, all prospective HRT instructors (military and civilian) shall be screened for suitability prior to assuming their duties according to references (w), (x), and enclosure (2).

(5) The provisions of this guidance do not seek to eliminate all exposure to risk when such exposure is necessary to meet valid learning objectives. Due to the dangers inherent in ORM RAC I and II, additional safeguards are required. Marine Corps operations require aggressive training programs that prepare personnel to perform high-risk operations effectively.

(6) FLC and Training Detachment Commanders are required to institute the policies contained in references (i), (j), (o), (p), (v), (x) and this Order, to ensure every reasonable measure is taken to reduce the risk of injury or loss of life. Nothing in these Orders replaces the need for Commanders to be involved in all aspects of training. The intent is to

implement the rigors of a sound ORM process in combination with the time-tested, common sense approach to leadership and adherence to the Marine Corps' Training Principles.

## APPENDIX A

## COURSE DESCRIPTIVE DATA

1. COURSE TITLE.
  2. LOCATION.
  3. COURSE ID.
  4. OTHER SERVICE COURSE NUMBER.
  5. MILITARY ARTICLES AND SERVICE LIST NUMBER.
  6. PURPOSE.
  7. SCOPE.
  8. LENGTH (PEACETIME).
  9. CURRICULUM BREAKDOWN (PEACETIME).
  10. LENGTH (MOBILIZATION).
  11. CURRICULUM BREAKDOWN (MOBILIZATION).
  12. MAXIMUM CLASS CAPACITY.
  13. OPTIMUM CLASS CAPACITY.
  14. MINIMUM CLASS CAPACITY.
  15. CLASS FREQUENCY.
  16. STUDENT PREREQUISITES.
  17. MOS RECEIVED.
  18. OCCUPATIONAL FIELD MANAGER.
  19. FUNDING.
  20. REPORTING INSTRUCTIONS.
  21. INSTRUCTOR STAFFING REQUIREMENTS.
  22. SCHOOL OVERHEAD.
  23. TRAINING SUPPORT REQUIREMENTS.
  24. TASK LIST.
- CDD NOTES:

APPENDIX B

POI Review Checklist

POI REVIEW CHECKLIST			
COURSE NAME:		CID:	
CHECKED BY:		DATE:	
REQUIRED DOCUMENTATION: CURRENT APPROVED POI, CORRESPONDING T&R MANUAL(S) / TIP/MOS MANUAL			
ITEM	Y	N	REMARKS
COVER LETTER/ROP/CHECKLIST			
Cover letter (or endorsement letter) and ROP.			
Ensure POI Review Checklist is complete and signed.			
<b>PREFACE - PAGE iii</b>			
Reflects course purpose, graduates' information, and POC.			
<b>SECTION I - COURSE DESCRIPTIVE DATA</b>			
COURSE TITLE: Reflects complete course title listed in student registrar/TIP. (1)			
LOCATION: Reflects school name and location address. (2)			
COURSE ID: Reflects CID listed in student registrar/TIP. (3)			
OTHER SERVICE COURSE NUMBER (OSCN): Reflects OSCN, if applicable. (4)			
MILITARY ARTICLES AND SERVICE LIST NUMBER (MASL): Reflects MASL, if applicable (Courses approved for International students receive a MASL Number). (5)			
PURPOSE: Reflects course mission and endstate. (6)			
SCOPE: Reflects all areas of instruction. (7)			
LENGTH (PEACETIME): Reflects total number of course days. (8)			
CURRICULUM BREAKDOWN (PEACETIME): Reflects total academic/administrative hours - ensure that all categories contain designated hours. (9)			
LENGTH (MOBILIZATION): Reflects course length, use 10 hours/6 days per week calculation. (10)			
CURRICULUM BREAKDOWN (MOBILIZATION): Reflects peacetime curriculum breakdown, unless otherwise noted. (11)			
MAXIMUM CLASS CAPACITY: Reflects maximum class capacity, (consistent with TIP) (12)			
OPTIMUM CLASS CAPACITY: Reflects optimum class capacity. (13)			
MINIMUM CLASS CAPACITY: Reflects minimum class capacity. (14)			
CLASS FREQUENCY: Reflects course iterations (consistent with TIP, unless additions or deletions). (15)			
TARGET POPULATION DESCRIPTION/PREREQUISITES: Reflects Target Population Description and Prerequisites - see T&R Manual. (16)			
MOS RECEIVED: Reflects MOS received, if applicable. (17)			
OCCUPATIONAL FIELD MANAGER: Reflects agency managing course quotas. (18)			
FUNDING: Reflects MILPERS, TECOM (C464) or Unit funded. (19)			
REPORTING INSTRUCTIONS: Reflects reporting instructions and messing/billeting notes. (20)			
INSTRUCTOR STAFFING REQUIREMENTS: Reflects instructor billets and corresponding comments. (See Appendix A for Instructor Computation Worksheet (ICW) (21)			
SCHOOL OVERHEAD REQUIREMENTS: Reflects school overhead billets and corresponding comments. (22)			
TRAINING SUPPORT REQUIREMENTS: Reflects all facility/equipment/ammunition required to conduct one iteration of the course and corresponding comments. (23)			
TASK LIST: See Appendix B. (24)			
<b>SECTION I - APPENDIX A - INSTRUCTOR COMPUTATION WORKSHEET (ICW)</b>			
ICW notes should state how many instructors are required - if different from the ICW calculation. Additionally, if more instructors are required than the ICW number of instructors, identify where additional instructors will come from.			

<b>SECTION I - APPENDIX B - TASKLIST</b>		
TASK LIST reflects all designated T&R Manual events and applicable comments.		
<b>SECTION II - SUMMARY OF HOURS</b>		
Titles/Hours/Annexes are complete.		
<b>SECTION III - SCOPE OF ANNEXES</b>		
Each Annex is complete and reflects the purpose of each annex.		
<b>SECTION IV - CONCEPT CARDS</b>		
LOCATION OF LEARNING OBJECTIVES REPORT: Ensure every LO is assigned to a concept card and all LOs are taught and evaluated.		
<b>INDIVIDUAL CONCEPT CARDS</b>		
Reflects Lesson title.		
Reflects appropriate annex.		
Ensure total hours are appropriate for each lesson.		
Reflects all methods/hours.		
Ensure student-to-instructor ratio is appropriate for each method - reflect Maximum class capacity only.		
Reflects required media necessary to conduct class.		
Reflects required ammunition, if applicable.		
Ensure concept cards contain either Learning Objectives (LOs) or Lesson Purposes (keep to a minimum).		
Ensure TLOs contain condition, one behavior and standard verbatim from T&R event. If not, ensure Downgrade justifications are included for tasks that cannot be performed to standard. Downgraded TLOs should reflect behavior expected from students - in the learning environment.		
Ensure ELOs contain condition, one behavior and standard.		
Ensure all references required to conduct class are listed on corresponding concept card.		
Ensure Administrative cards describe event in detail (check-in, check-out, graduation) - located in Annex Z.		
<b>SECTION V- STUDENT PERFORMANCE EVALUATION</b>		
Describes purpose and method(s) of the student's evaluation.		
Describes remediation procedures and what happens if student fails remediation.		
Describes course mastery/graduation criteria.		
<b>SECTION VI - DISTRIBUTION LIST</b>		
Ensure Distribution List reflects agencies where the POI is to be distributed - minimum distribution should reflect: COMMARFORRES/COMMARFORLANT/COMMARFORPAC and Marine Corps Institute (MCI).		
<b>USEFUL INFORMATION</b>		
To find calendar days $\frac{\text{training days}}{5} \times 7 = \text{estimated calendar days}$		
To find training days $\frac{\text{calendar days}}{7} \times 5 = \text{estimated training days}$		
Average length of a training day = total academic hours divided by training days		
For mobilization 10 hour day, 6 day week		
TAD = 139 calendar days or less	PCS = 140 calendar days or more	
Funding - (PCS = MILPERS) (TAD = TECOM (C464) or unit funding)		

Course Chief: \_\_\_\_\_

Formal School Manager: \_\_\_\_\_

APPENDIX C

Program of Instruction Sample Cover Letter



UNITED STATES MARINE CORPS  
SCHOOL/COMMAND  
ADDRESS  
QUANTICO, VIRGINIA 22134-

IN REPLY REFER TO:  
1553.2  
CO  
Date

From: Commanding Officer  
To: Commanding General, Training Command  
Subj: PROGRAM OF INSTRUCTION FOR XYZ COURSE (CID: 12345)  
Ref: (a) MCO 1553.2B  
Encl: (1) CCRB ROP (CID: 12345)  
(2) Program of Instruction for XYZ Course  
(3) POI Package Checklist (CID: 12345)

1. The Program of Instruction (POI) for XYZ course is submitted in accordance with the reference, recommending approval.
2. The POI for XYZ has been reviewed and approved by this command.
3. Point of contact regarding this information is Mr. Curriculum, S-3 Academics, at comm: (555) 555-5555, or DSN: 555-5555.

//CO Signature//

Copy to:  
Files  
S-3 Academics Director

APPENDIX D

MCTIMS SCR/PTR Template

**Marine Corps Training Information Management System  
(MCTIMS)**

<https://timsapp.tecom.usmc.mil/HomePort/>

Systems Change Request (SCR) / Production Trouble Report (PTR)  
Email Completed Form to MCTIMS Helpdesk: MCSC\_MCTIMS\_SUPPORT  
Phone: 703-784-4093; DSN 278-4093

Requested By: \_\_\_\_\_ Date Requested: \_\_\_\_\_

Requestor Email/Phone Number: \_\_\_\_\_

Requestor Unit/School: \_\_\_\_\_

**MODULE IMPACTED:**

- Curriculum Management
- External System Interface
- MOS Manual
- Cognos Report Server
- QuestionMark Perception On-line Testing (QMP)
- Security Manager
- Sports Medicine Injury Prevention (SMIP)
- Student Evaluation
- Student Management
- Student Registrar
- T&R Manual
- Unit Training Management

**REQUESTED TYPE (see page D-3 for definitions):**

- System Change Request (SCR)
- Production Trouble Report (PTR)

**PRIORITY (see page D-3 for definitions):**

- Emergency
- Urgent
- Must Fix
- Fix if Time
- Nice to Have



Marine Corps Training Information Management System (MCTIMS)  
Systems Change Request (SCR) / Production Trouble Report (PTR)

What are System Change Requests and Production Trouble Reports?

▫ A *System Change Request (SCR)* is a documented request to change or enhance the MCTIMS software.

▫ A *Production Trouble Report (PTR)* is a documented problem in the production system where functionality does not work as it was originally designed.

What do the priority levels mean?

▫ Emergency: Critical core functionality is not working for a broad user base and for which there is no viable temporary workaround solution. This will more than likely require an emergency production deployment.

▫ Urgent: for PTRs, critical core functionality is not working for a limited user base or for a broad user base there may be a temporary workaround which causes some user discomfort. This may require an emergency production deployment outside of the normal release cycle, unless a quarterly release is pending.

▫ Must Fix: For PTRs a workaround exists which does not impact many users. For SCRs, this priority level indicates new functionality which must be introduced to the production system.

▫ Fix if Time: For PTRs, few if any users are impacted in a negative manner. The problem may even be seamless to the end-users. For SCRs, these should eventually be implemented, but after all "Must Fix" priority SCRs are completed.

▫ Nice to Have: For PTRs, no users will ever discover the problem (unlikely). For SCRs, these items are considered to be gold-plating once all other higher priority SCRs/PTRs have been implemented. These items may be raised to a higher priority as time progresses.

## APPENDIX E

## Resource Assistance Guide

<b>RESOURCE ASSISTANCE GUIDE*</b>						
<b>Resource Activity</b>	<b>Budget</b>	<b>Manpower</b>	<b>Facilities</b>	<b>Equipment</b>	<b>Ammunition</b>	<b>Remarks</b>
<b>TECOM Staff</b>	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
<b>TRNGCOM</b>	TRNGCMD, Comptroller	TRNGCMD, G1	TRNGCMD, G4	TRNGCMD, G4	TRNGCMD, G4	
<b>MCRD</b>	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
<b>MAGTFTC</b>	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
<b>MAWTS-1</b>	MAGTFTC	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
<b>MWTC</b>	MAGTFTC	TECOM/TR NGCMD, G1	MCB CamPen	MCB CamPen	MCB CamPen	Per MOA w/CamPen
<b>Formal School Quantico</b>	TECOM/TRN GCMD, Comptroller	TECOM/TR NGCMD, G1	TECOM/TRN GCMD, G4	TECOM/TRN GCMD, G4	TECOM/TRN GCMD, G4	
<b>Formal School CamLej</b>	TECOM/TRN GCMD, Comptroller	TECOM/TR NGCMD, G1	MCB CamLej	TECOM/TRN GCMD, G4	MCB CamLej	Per MOA w/CamLej
<b>Formal School CamPen</b>	TECOM/TRN GCMD, Comptroller	TECOM/TR NGCMD, G1	MCB CamPen	MCB CamPen	MCB CamPen	Per MOA w/CamPen
<b>MCCES</b>	TECOM/TRN GCMD, Comptroller	TECOM/TR NGCMD, G1	MAGTFTC	MAGTFTC	MAGTFTC	Per LOI to MAGTFTC
<b>Detachments (Training)</b>	TECOM/TRN GCMD, Comptroller	TECOM/TR NGCMD, G1	TECOM/TRN GCMD, G4	TECOM/TRN GCMD, G4	TECOM/TRN GCMD, G4	Per MCO 1580.7D
*In general, the ATD/GTD task analyst is the primary POC for resource issues related to POIs. For all other resource matters, TECOM organizations and activities are encouraged to contact the office indicated above with questions and for problem resolution.						

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## APPENDIX F

## Formal Learning Center Evaluation Report



## UNITED STATES MARINE CORPS

COMMAND LETTER HEAD

COMMAND LOCATION

COMMAND ADDRESS

1500  
CMD CODE  
XX OCT 10

From: Commander, (Name of FLC)  
To: President, (Name of T&R Manual) Conference

Subj: FORMAL LEARNING CENTER EVALUATION REPORT

Ref: (a) MCO 1553.2B

1. The following course(s) based on the (NAVMC # and T&R short title) signed (Date) were approved by Commander Training Command on the dates indicated:

- a. Course Title with CID and approval date.
- b. (List continues until courses complete).

2. Consistent with the Marine Corps ADDIE ISD process detailed in reference (a) and the SAT Users Guide, (Name of the FLC) continuously evaluates the effectiveness of the learning contained in these approved courses in the following ways:

a. (Name of evaluation measure with a short description; Instructional Rating Forms, Examination Rating Forms, End of Course Critiques, After Instruction Reports, Post Graduate Surveys, Post Graduate Supervisor Surveys).

- b. (Applicable evaluation measure, with short description).
- c. (List all applicable evaluation measures until complete).

3. Analysis of these evaluations was completed and the following trends were noted:

- a. Note the trend in instructional effectiveness or lack thereof with a short description if applicable.
- b. Note the trend in superfluous/obsolete learning, if noted.
- c. Note the trend in training/education gaps, if noted.

4. As a result of this analysis, (FLC name) recommends the following:

- a. Deletion of superfluous/obsolete events.
- b. Addition of events to address learning gaps.

Subj: FORMAL LEARNING CENTER EVALUATION REPORT

- c. Changes in existing events to address deficiencies.
- d. Changes in learning objectives, instructional methods or duration of training to address other gaps not related to the text of T&R events.

I. M. COMMANDER

STANDARD

## APPENDIX G

## Course Content Review Board Template

## Course Content Review Board (CCRB) Preparation Checklist

1. Review changes to the Training & Readiness (T&R) events from the most recent, valid T&R conference that are associated with the course under review.
2. Review empirical data:
  - a. Instructor Rating Form (IRF)
  - b. After Instruction Report (AIR)
  - c. Test Matrices
  - d. End of Course Critique (ECC)
  - e. After Course Report (ACR)
  - f. Post Graduate Surveys (from students and supervisors)
3. Review POI:
  - a. Section 1 - Course Descriptive Data (CDD)
    - (1) Block 16 Target Population Description and Course Prerequisites
    - (2) Block 21 Instructor Staffing Requirements
    - (3) Block 22 School Overhead
    - (4) Block 23 Training/Education Support Requirements
  - b. Section IV - Concept Cards
    - (1) Review Terminal Learning Objective(s) (TLOs) and Enabling Learning Objective(s) (ELOs). TLO is linked directly to the T&R event, but needs to be reviewed to ensure the TLO can be executed, as written, to standard. The ELO is developed through the learning analysis; needs to be reviewed to ensure the ELO is still relevant.
      - (2) Review the methods of instruction and hours associated with each method. Any adjustment should be validated through the empirical data collect on this Concept Card.
      - (3) Review any ammunition associated with concept card. Ammunition is linked to a Terminal Learning Objective (TLO) and its associated doctrinal publication.

(4) Review any equipment/material associated with concept card. Equipment/material is linked to a Terminal Learning Objective (TLO) and its associated doctrinal publication.

(5) Review the notes section ensuring they are current with associated training evolution.

(6) Revise concept cards to reflect the addition, deletion or modification of specified T&R events.

c. Section V - Student Performance Evaluation

(1) Student evaluation covers evaluation philosophy, methods of evaluation and disposition of academic failures.

(2) Identify which T&R event(s) the students perform to standard during the course.

4. Review Test Items:

a. The Learning Objective Worksheet (LOW) is where the LO and its associated test item(s) are located. Test items should reflect the condition, behavior and standard outlined in the LO. Review the test item for validity and relevancy. Test items are based on current doctrine.

1 Apr 2011



UNITED STATES MARINE CORPS  
 COMMAND LETTER HEAD  
 COMMAND LOCATION  
 COMMAND ADDRESS

1500  
 CMD CODE  
 XX OCT 10

From: Course Content Review Board Chairman  
 To: Commander, Training Command (Code C47)  
 Via: Commanding Officer, (FLC Name)

Subj: RECORD OF PROCEEDINGS (ROP) FOR COURSE CONTENT REVIEW  
 BOARD (CCRB) FOR (COURSE NAME AND COURSE IDENTIFICATION)

Ref: (a) DRAFT MCO 1553.2B

Encl: (1) After Instruction Data Report  
 (2) Post Graduate Survey Data Report  
 (3) Abstract for the (Community Name) T&R Manual Review Conference  
 (4) CCRB members full name and signature  
 (5) Summarization of changes from the old to new POI

1. A CCRB was conducted for the (Course Name, CID #) on (Date Conducted) with the mandate to formally review, validate, and record information pertaining to the recommendations to improve the effectiveness and efficiency of the course Program of Instruction (POI).

2. Areas reviewed and briefed to the CCRB included: (List all topics that were presented to the CCRB; the following is a list of what the FLC should initially present to set the foundation for discussion)

Instructional Rating Forms  
 Examination Rating Forms  
 End of Course Critiques  
 After Instruction Reports  
 Post Graduate Surveys  
 Post Graduate Supervisor Surveys  
 Formal Learning Center Evaluation Report  
 T&R Manual

3. Purpose of this CCRB was to review the (course name and CID) POI and propose recommendations concerning the following academic concerns and classes which were identified by evaluation data, see enclosures (1) and (2):

a. Academic Concerns

1. Included reviewing the emphasis of the course to ascertain whether it was current.

2. Review of entire course in an effort to reduce course length.

b. Classes. Included review of course/task: XXXX-XX, YYYY-YY, and ZZZZ-ZZ.

4. Topics discussed and agreed upon by attendees were:

a. Topic: Abc

Discussion: Abc

Recommendation(s): Abc

b. Topic: Task 2100-MAPS-1012 - Navigate to a known distance

Discussion: The Formal Learning Center has identified equipment shortages that prevent performance based training for students to navigate to a known grid coordinate (shortage of lensatic compasses).

Recommendation(s): Conduct short-term loan of lensatic compasses from MEF until deficiency can be corrected. Submit an Unfunded Deficiency Request (UDR) for 111 Lensatic Compasses.

c. Topic: Abc

Discussion: Abc

Recommendation(s): Abc

Dissenting Position: Abc

Dissenting Position Recommendation: Abc

Supporting Position Rebuttal: Abc

5. All recommendations were voted on by the board (see enclosure 3). See enclosure (4) for a summarization of changes from the old to new POI. For all questions and or concerns contact (contact info).

I. M. SOMEBODY  
TITLE

CCRB MEMBERS  
(SAMPLE)

RANK/NAME	SIGNATURE	COMMAND
LtCol J. A. Lejeune		HQMC, CD&I, CDD
Maj U. B. Kidding		HQMC, PP&O
Capt W. A. Carry		I MEF
Capt J. P. Mei		II MEF
Capt J. Powell		EWS
MGySgt A. Smith		III MEF
MGySgt I. Bruce		22 <sup>nd</sup> MEU
MSgt N. G. Anywhere		HQMC, PSL
MSgt J. J. Jones		MCI West
GySgt B. India		MARCORDET, Fort Lee

The following table summarizes the difference of the old 0300 POI to the new 0300 POI.

New 0300 POI	Old 0300 POI
Annex A - mortar operations 13.50 Hrs	Annex A - was M16A2 (deleted) 9.25 Hrs
Annex B - M224 60mm Mortar 71.25 Hrs	Annex B - was M249 (deleted)
Annex C - M252 81mm Mortar 69.00 Hrs	Annex C - was M203 (deleted) 81 mm was annex N and had 70.00 Hrs
Annex D - Values Based Training	Annex D - was munitions (deleted)
Annex E - combat conditioning	Annex E - was Navigation (deleted)
Annex F - infantry integration 56.75 Hrs	Annex F - was combat conditioning and martial arts (deleted) 46.25 Hrs
	Annex G - communications (deleted)
	Annex H - NBC (deleted)
	Annex I - offense (deleted)
	Annex J - defense (deleted)
	Annex k - scouting and patrolling (deleted)
	Annex L - MOUT (deleted)
	Annex O - battle skills assessment exercise (deleted)
<b>240.00 Total Academic Hours</b>	<b>409.75 Total Academic Hours</b>

## APPENDIX H

## Training and Readiness Conference ROP Template



## UNITED STATES MARINE CORPS

TRAINING AND EDUCATION COMMAND  
1019 ELLIOT ROAD  
QUANTICO, VIRGINIA 22134

1500  
GTD  
XX Apr 10

From: (XXX) Task Analyst, Ground/Aviation Training Branch  
To: Commanding General, Training and Education Command  
Via: (1) Branch Head, Ground/Aviation Training Branch  
(2) Commander, Training Command

Subj: RECORD OF PROCEEDINGS FOR THE (Community Name/Title) T&R MANUAL  
REVIEW CONFERENCE

Ref: (a) MCO 1553.2B  
(b) MCO P3500.72A, Ground Training and Readiness Program OR  
NAVMC 3500.14, Aviation Training and Readiness Program

Encl: (1) Signature page of conference attendees

1. Per the references, the (Title) T&R Manual Review Conference occurred from XX to XX Apr 2010 aboard MCRD Parris Island, SC.

2. Conference Attendees. The following commands were represented: TECOM G-3, TECOM GTD, MCRD Parris Island, MCRD San Diego, EWTGLANT and EWTGPAC. The enclosure contains signatures of attending members. The conference members were as follows:

<u>Name</u>	<u>Unit</u>
Maj H. Hefner	MCRD PI, G-3
Capt I. M. America	EWTGPAC
Capt D. Daly	EWTGLANT
Capt F. Laurel	MCRD PI, SptBn, ITC Co
Capt D. L. Hardy	MCRD SD, SptBn, ITC Co
Capt A. C. Jones	TECOM, G-3
GySgt A. F. Baker	MCRD PI, SptBn, ITC Co
GySgt I. M. Sisyphus	TECOM, GTD
SSgt D. A. Smith	EWTGPAC
Ms. J. Jameson	MCRD SD, G-3

3. Conference Objectives. The key function of the T&R review conference was to ensure that the identified training requirements and support resources required for individual training in support of the Marine Corps (T&R Short Title) were addressed and met. The following were the objectives of the conference:

- a. Review/Refine (T&R Title) Core Mission Essential Task List
- b. Link Collective Events to Mission Essential Tasks (METs)
- c. Identify Evaluation-Coded (E-Coded) Collective Events
- d. Review/Refine Collective Events
- e. Link Subordinate Collective Events to Higher Collective Events
- f. Link Individual Events to Collective Events

4. Methodology. Following a T&R Manual brief by the Operations Section of TECOM, the attendees were split into two breakout groups. Group 1 focused on XXX and Group 2 focused on ZZZ. 141 Collective and 195 Individual Events were reviewed.

5. Principal parameters guiding each working group were as follows:

a. Items covered were briefed, discussed and voted on when action to change/correct an item was deemed necessary.

b. Dissenting opinions were encouraged; however it was the conference attendees' responsibility to identify and recommended the best solutions possible.

c. If consensus could not be reached on a topic, a vote from all working group members was initiated on the proposed action and the dissenting opinion(s) were captured.

d. On any issue not reaching consensus, the proposed action will be adjudicated by TECOM G-3 and the accepted action will be included in the draft T&R Manual.

6. Significant recommended changes (w/dissenting opinions if needed) are as follows:

a. TOPIC: Abc

DISCUSSION: Abc

RECOMMENDATION: Abc

b. TOPIC: Xyz

DISCUSSION: Xyz

RECOMMENDATION: Incorporate the following definitions in the administrative instructions of an event if the term was used in the condition.

(1) AAA: Abc

(2) BBB: Abc

(3) CCC: Abc

c. TOPIC: Xyz  
DISCUSSION: Xyz

RECOMMENDATION: Xyz

DISSENTING POSITION: Xyz

d. TOPIC: Abc

DISCUSSION: Abc

RECOMMENDATION: Abc

DISSENTING POSITION: Abc

DISSENTING POSITION RECOMMENDATION: Abc

SUPPORTING POSITION REBUTTAL: Abc

7. Conference members also discussed Xyz.

8. The members of this conference were able to validate, modify, and/or create all individual training events for the Marine Corps (T&R Short Title) Training Program to include the following: Abc, Xyz, and Abc.

9. Staffing comments received after the 30 day staffing of the draft Training MOS T&R Manual will be adjudicated in the following manner:

a. Administrative comments will be reviewed and if accepted, changes will be made by the POC.

b. Substantive comments will be reviewed by TECOM G-3 and each comment will receive a notation and the following action:

(1) Accepted. Substantive comments accepted will result in the proposed changes staffed back to the conferees via email for comment and concurrence. The staffing period for comments will be five days, silence is consent. The adjudicator will make the final decision.

(2) Accepted with modification. Substantive comments accepted with modification by the adjudicator will be staffed back to the conferees via email for comment and concurrence. The staffing period for comments will be five days, silence is consent. The adjudicator will make the final decision.

(3) Rejected. Substantive comments rejected by the adjudicator will be noted with a rationale included in the staffing matrix. Substantive comments can be rejected for the following reasons: issue previously decided by the conference; issue not germane to the T&R Manual; Adjudicator's judgment.

10. Way Ahead. The following is a list of follow on actions and tentative dates:

a. Immediate Update MCTIMS

b. XX Apr 2010 Review Message Released

- c. XX May 2010 Reconcile Comments; Administrative Comments adjudicated by GySgt Sisyphus, Substantive Comments reviewed by TECOM G-3
- d. XX Jun 2010 Submit Draft Manual for CG Signature

11. Recommendations. Any recommendations from the Task Analyst to the CG, to include process improvements, areas to be highlighted, special recognition, or any recognized trends should be noted here

12. For any questions and or concerns, the point of contact is GySgt Sisyphus at 703-555-2494.

I. M. SISYPHUS

Copy to:  
T&R Conference Subject Matter Experts

**STANDARD**

COMMUNITY NAME T&R CONFERENCE ATTENDEE SIGNATURE BLOCK  
(SAMPLE)

<u>RANK/NAME</u>	<u>SIGNATURE</u>	<u>COMMAND</u>
LtCol J. A. Smelton		HQMC, CD&I, CDD
Maj U. B. Gettingit		HQMC, PP&O
Capt W. A. Carry		I MEF
Capt J. P. Mei		III MEF
Capt J. Powell		EWS
MGySgt A. Smith		III MEF
MGySgt I. Bruce		22 <sup>nd</sup> MEU
MSgt N. G. Anywhere		HQMC, PSL
MSgt J. J. Jones		MCI West
GySgt B. India		MARCORDET, Fort Lee

## APPENDIX I

## Automated Inspection Reporting System 400 Checklist

(Current version maintained at:

http://hqinet001.hqmc.usmc.mil/ig/div\_inspections/AIRS%20Checklist/AIRS%20MON  
THLY%20UPDATE/Checklist400.rtf)

1:18:32 PM

AIRS DETAILED INSPECTION CHECKLIST

04/01/2010

FA SC STMT

TEXT

400

FORMAL SCHOOL MANAGEMENT

Functional Area Manager: TECOM GTD

Point of Contact: LTCOL JOHN LEJEUNE

DSN 278-2494 (COML) 703 784-2494

Date Last Revised: 17 February 2010

400 01

P O I, C C R B, M L F

400 01 001

Is the school employing the current version of MCTIMS to produce a POI?

Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1 PARAGRAPH 3, CHAPTER 5  
PARAGRAPH 2.(a).(4))

400 01 002

Does each course have a Program of Instruction (POI) approved by CG, TRNGCMD (CG, TECOM for non TRNGCMD units)?

(NOTE) Inter-service Training Review Organization (ITRO) schools:

In the case of collocated training on another service base, each U. S. Marine Corps unique course has a POI approved by CG, TRNGCMD. In the case of consolidated training of U. S. Marine Corps personnel in another service school, any U. S. Marine Corps unique training phase(s) has a POI approved by CG, TRNGCMD. All other service programs of instruction in which U. S. Marine Corps personnel are being trained will comply with the curriculum submission and approval requirements of the host service.

Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 5.(j))

400 01 003

Has a formal CCRB been conducted for each course at least every two years?

Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 3 PARAGRAPH 5.(d))

400 01 004

Does each course have the following required documents on-hand:

a. T&amp;R Manual or other service ITEs (for joint schools)?

b. POI?

c. MLF(s)?

d. ROP?

e. Course Schedule?

## Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1 PARAGRAPH 2; CHAPTER 1 PARAGRAPH 4.(g); CHAPTER 1 PARAGRAPH 6.(a); CHAPTER 2 PARAGRAPH 5.(c); CHAPTER 2 PARAGRAPH 5.(g))

400 01 005 Does each MLF contain, at a minimum, the following material:

- a. LAWS?
- b. LOWs?
- c. Concept Card(s)?
- d. Lesson Plan?
- e. Student Outline?
- f. Supplemental Student Materials? (if applicable)
- g. Media? (or a description of the media and location)
- h. Instructor Preparation Guide (IPG)?
- i. Operational Risk Assessment Worksheet (ORAW)?

(LAWS and LOWs are not required for lesson purpose classes)

## Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1 PARAGRAPH 6.(b))

400 01 006 Does the training/course schedule contain, at a minimum, the following requirements:

- a. Lesson Designators?
- b. Lesson Titles?
- c. Lesson Times?

## Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1 PARAGRAPH 6.(a))

400 01 007 Does the training schedule match the POI.?

## Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1 PARAGRAPH 6.(a))

400 01 008 Does each MLF match the POI?

## Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1 PARAGRAPH 6.(a))

400 01 009 Have Operational Risk Assessments been conducted for every training lesson/event in the POI on a yearly basis?

## Reference

(MCO 1553.2B, ENCLOSURE 1, CHAPTER 5 PARAGRAPH 4.(a).(2))

400 02 FORMAL SCHOOL FACULTY

- 400 02 001 Has the school designated in writing a Formal School Manager (FSM)?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 6.(a))
- 400 02 002 Has the school designated in writing an Academics Officer/Director?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 7)
- 400 02 003 Has the school designated in writing a Course Chief for each POI?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 9)
- 400 02 004 Are training records maintained on every faculty member who conducts instruction or curriculum administration for U. S. Marine Corps students?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 2)
- 400 02 005 Have first time instructors attended the Formal School Instructor Course (FSIC) at Train the Trainer School (T3S) or other service instructor course within 120 days of joining the School?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 5.(a))
- 400 02 006 Have returning instructors completed Marine Corps or other service instructor courses within the last 5 years?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 3.(a))
- 400 02 007 Have curriculum developers attended the Curriculum Developers Course (CDC) at Train the Trainer School (T3S) within 120 days of joining the school or being transferred to a developer's billet/duty?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 5.(a))
- 400 02 008 Have all personnel completed the SAT and ORM DL courses?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 5.(d) (1) (a) (2))
- 400 02 009 Does the school have a Staff/Faculty Development Plan?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 2 PARAGRAPH 5.(d))
- 400 03 FORMAL SCHOOL EVALUATION
- 400 03 001 Does the school have an established internal evaluation plan for student performance?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 1, PARAGRAPH 3.(i); CHAPTER 3 PARAGRAPH 2.(b) and (c), PARAGRAPH 4.(a) and (b); CHAPTER 5 PARAGRAPH 2.(a) (5))

- 400 03 002 Does the school have an established internal evaluation plan for course materials?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 3 PARAGRAPH 1, PARAGRAPH 2.(a), PARAGRAPH 4, and PARAGRAPH 5)
- 400 03 003 Does the school have an established internal evaluation plan for instructor performance?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 3 PARAGRAPH 1, and PARAGRAPH 2.(d))
- 400 03 004 Does the school have an established internal evaluation plan for instructional environment?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 3 PARAGRAPHS 1 and 4)
- 400 03 005 Does the school have an established external evaluation plan to gauge course effectiveness?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 3 PARAGRAPH 4.(b) and (c), PARAGRAPH 4.(g), and PARAGRAPH 5)
- 400 04 STUDENT REGISTRAR
- 400 04 001 Have Class Convening Rosters for each class been submitted through the TECOM Marine Corps Training Information Management System (MCTIMS) Student Registrar, to CG, MCCDC (C4611) within 5 calendar days of the class beginning date?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 5 PARAGRAPH 2.(a).(2).(a); ENCLOSURE 3, PARAGRAPH 7)
- 400 04 002 Have Class Completion Rosters for each class been validated through the MCTIMS Student Registrar, to CG, MCCDC (C 4611) within 7 calendar days of the class ending date?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 5 PARAGRAPH 2.(a).(2).(b); ENCLOSURE 3, PARAGRAPH 7)
- 400 04 003 Have Class schedules for a course of instruction been submitted via the MCTIMS Scheduling Wizard by 1 June each year?  
Reference  
(MCO 1553.2B, ENCLOSURE 1, CHAPTER 5 PARAGRAPH 2.(a).(6))
- 400 05 INTER-SERVICE TRAINING REVIEW ORGANIZATION (ITRO)
- 400 05 001 Are all other service POIs used to instruct U.S. Marine Corps personnel inspected in accordance with the standards governing the host service training, with a courtesy copy of the inspection results forwarded to CG, TRNGCMD?  
Reference  
(ITRO MANUAL)
- 400 05 002 Are all Memorandums of Agreement (MOA)s or Memorandums of Understanding (MOU)s for applicable support from the host service

current, or submitted for approval to the applicable host service and the ITRO?

Reference  
(ITRO MANUAL)

STANDARD

## APPENDIX J

## Training Command Formal Learning Centers

<b>SCHOOLS INDEX</b>	<b>CITY</b>	<b>STATE</b>
ASSAULT AMPHIBIAN SCHOOL BN – AASBN	CAMP PENDLETON	CALIFORNIA
FIELD MEDICAL TRAINING BN WEST - FMTB (W)	CAMP PENDLETON	CALIFORNIA
SCHOOL OF INFANTRY WEST – SOI (W)	CAMP PENDLETON	CALIFORNIA
MARINE CORPS COMMUNICATION-ELECTRONICS SCHOOL - MCCES	TWENTYNINE PALMS	CALIFORNIA
FIELD MEDICAL TRAINING BN EAST - FMTB (E)	CAMP LEJEUNE	NORTH CAROLINA
SCHOOL OF INFANTRY EAST - SOI (E)	CAMP LEJEUNE	NORTH CAROLINA
MARINE CORPS ENGINEER SCHOOL – MCES	CAMP LEJEUNE	NORTH CAROLINA
MARINE CORPS COMBAT SERVICE SUPPORT SCHOOLS - MCCSSS	CAMP LEJEUNE	NORTH CAROLINA
TRAIN THE TRAINER SCHOOL - T3S	CAMP LEJEUNE	NORTH CAROLINA
OFFICER CANDIDATES SCHOOL – OCS	QUANTICO	VIRGINIA
THE BASIC SCHOOL – TBS	QUANTICO	VIRGINIA
WEAPONS TRAINING BN – WTBN	QUANTICO	VIRGINIA
COMMUNICATIONS SCHOOL	QUANTICO	VIRGINIA
MARINE CORPS INTELLIGENCE SCHOOLS – MCIS	VIRGINIA BEACH	VIRGINIA

<b>MARINE AVIATION TRAINING GROUPS INDEX</b>	<b>CITY</b>	<b>STATE</b>
MATSG 23 - NAS LEMOORE	LEMOORE	CALIFORNIA
MATSG 21 - NAS PENSACOLA	PENSACOLA	FLORIDA
MATSG 22 - NAS CORPUS CHRISTI	CORPUS CHRISTI	TEXAS
MATSG 33 - NAS OCEANA	VIRGINIA BEACH	VIRGINIA
MATSG 53 - NAS WHIDBEY ISLAND	OAK HARBOR	WASHINGTON

**MARINE CORPS COMBAT SERVICE SUPPORT SCHOOLS - MCCSSS**

**Schools Subordinate to CO MCCSSS:**

Financial Management School  
Logistics Operations School  
Personnel Admin School  
Supply School

**MARINE CORPS INTELLIGENCE SCHOOLS - MCIS**

**School MarDets Subordinate to CO MCIS:**

Nat'l Geospatial Intel College MarDet Ft Belvoir, VA  
Naval Com Trng Ctr MarDet Corry Station, FL  
Firefighting Acad MarDet Goodfellow, TX  
USA Intel Ctr MarDet Ft Huachuca, AZ  
NMITC MarDet VA Beach, VA  
DLI MarDet Monterey, CA

**MARINE CORPS COMMUNICATION-ELECTRONICS SCHOOL - MCCES**

**Schools Subordinate to CO MCCES:**

Command, Control, Communications & Information (C4I) Quantico, VA  
USA Signal School MarDet Ft Gordon, GA

DETACHMENT INDEX	CITY	STATE
USA ORDNANCE MUNITIONS ELECTRONIC & MAINT SCHOOL	REDSTONE	ALABAMA
USA INTELLIGENCE CENTER	FT HUACHUCA	ARIZONA
T3S WEST	CAMP PENDLETON	CALIFORNIA
DEFENSE LANGUAGE INSTITUTE	MONTEREY	CALIFORNIA
NAVAL POSTGRADUATE SCHOOL	MONTEREY	CALIFORNIA
C4I	SAN DIEGO	CALIFORNIA
EWTPAC	SAN DIEGO	CALIFORNIA
SERE SCHOOL (W)	NAS NORTH ISLAND	CALIFORNIA
NAVSCOLEOD	EGLIN AFB	FLORIDA
505TH TRAINING SQUADRON	HURLBURT AFB	FLORIDA
USMC COMBAT DIVE SCHOOL	PANAMA CITY	FLORIDA
CORRY STATION	PENSACOLA	FLORIDA
NAVY SUPPLY SCHOOL	ATHENS	GEORGIA
USA INFANTRY SCHOOL	FT BENNING	GEORGIA
USA SIGNAL SCHOOL	FT GORDON	GEORGIA
JOINT / MULTI-TRADIL TRSINING SCHOOL	FT MCPHERSON	GEORGIA
USA ARMOR CENTER	FT KNOX	KENTUCKY
USA ORDNANCE CENTER	APG	MARYLAND
DEFENSE INFORMATION SCHOOL	FT MEADE	MARYLAND
SERE SCHOOL (E)	NAS BRUNSWICK	MAINE
USAF WHEATHER/CALIBRATION	KEESLER AFB	MISSISSIPPI
MATSS-1	MERIDIAN	MISSISSIPPI
FORT LEONARD WOOD	FT LEONARD WOOD	MISSOURI
USA JF KENNEDY SPECIAL WARFARE	FT BRAGG	NORTH CAROLINA
SMALL BOAT TRNG DET --AT USCG SPEC MISSIONS CENTER	CAMP LEJEUNE	NORTH CAROLINA
T3S EAST	CAMP LEJEUNE	NORTH CAROLINA
DEFENSE NUCLEAR WEAPONS	KIRTLAND	NEW MEXICO
USA FIELD ARTILLERY	FT SILL	OKLAHOMA
MARINE CORPS DETACHMENT	NEWPORT	RHODE ISLAND
US NAVY JUSTICE SCHOOL	NEWPORT	RHODE ISLAND
INTERSERVICE POSTAL TRAINING ACTIVITY	FT JACKSON	SOUTH CAROLINA
NAVAL CHAPLAINCY SCHOOL & CENTER	FT JACKSON	SOUTH CAROLINA
USA AIR DEFENSE ARTILLERY CENTER	FT BLISS	TEXAS
FIREFIGHTING ACADEMY	GOODFELLOW	TEXAS
USMC DETACHMENT	LACKLAND	TEXAS
CABLE ANTENNA/SPLICING/SWITCH TECH SCHOOL	SHEPPARD AFB	TEXAS
USA JAG SCHOOL	CHARLOTTESVILLE	VIRGINIA
DEFENSE GEOSPATIAL INTELLIGENCE SCHOOL	FT BELVOIR	VIRGINIA
USA TRANSPORTATION SCHOOL	FT EUSTIS	VIRGINIA
USA QUARTERMASTER CENTER	FT LEE	VIRGINIA
USN SCHOOL OF MUSIC	NORFOLK	VIRGINIA
EWGLANT	NORFOLK	VIRGINIA
NMITC DET	VIRGINIA BEACH	VIRGINIA

## APPENDIX K

## Cease Training (CT) Procedures and Requirements

1. Ensure all students are briefed on CT policy and procedures prior to the start of any training evolution (i.e., during the course indoctrination). Specific verbal and/or non-verbal CT signals shall be reviewed prior to commencing any high-risk evolution. For multi-day evolutions, CT procedures will be re-briefed prior to commencing each day's training. Evolution specific CT procedures should be put in place where needed. All procedures should be standardized (with the exception of evolution specific) throughout the course.
2. CT may be called when a student or instructor expresses concern for personal safety; when a student or instructor requires relief from pain, heat stress, or other serious physical discomfort; when the procedures/requirements need explanation; or in cases of potential damage to equipment.
3. Both primary and assistant instructors must maintain situational awareness at all times and be alert to signs of student panic, fear, extreme exhaustion, or lack of confidence that might impair safe completion of the training evolution.
4. Following a CT call, the situation shall be examined and additional safety controls shall be put in place to allow safe resumption of training. Once the lead, on-scene instructor has fully reviewed the situation and put controls in place, he/she will make the decision to resume training, unless the FLC SOP directs otherwise.
5. If a student refuses to participate in training after appropriate safety controls have been put in place, or excessively and inappropriately uses the CT call to disrupt training, that student shall be removed from training and referred for administrative processing, that may include permanent removal from the training program.
6. Both primary and assistant instructors will document pertinent information (date, time, persons involved, equipment or facilities involved, conditions, situation, and out come) for every CT occurrence. The After-Instruction Report (AIR) is the recommended vehicle for documentation.
7. Example of a CT brief:  
  
"A Cease Training (CT) may be called by any student or instructor in any training situation when he is concerned for his own or another's safety, or he requests clarification of procedures or requirements. The purpose of CT is to avoid serious injury or loss of life, and to correct the hazardous situation so training can continue. CT should be used to remove students or instructors from a possible hazardous situation. A CT may be signaled by (...Insert appropriate nonverbal, alarm, or hand signal...). If the CT signal is not acknowledged, the signaler shall shout 'Cease Training' (or other action as required by the training activity)."

*Add amplifying information/procedures as needed.*

## APPENDIX L

## Formal Learning Center HRT Instructor Program

**INITIAL SCREENING.** FLC commanders/directors are ultimately responsible for ensuring that HRT instructor candidates are screened for professional, physical, and psychological suitability. This guide is intended to assist commanders/directors in conducting screenings appropriate to the training environment and risk/stress level. The screening process will begin at the detaching command. It is the responsibility of the gaining command to coordinate with the appropriate occupational field monitor to initiate the pre-screening process and to inform the detaching command that the candidate will be filling a high-risk instructor billet.

1. Service Record Book (SRB)/Officer Qualification Record (OQR) and Medical Screening. If the SRB/OQR and medical pre-screenings have not been completed, screen the potential HRT instructor per enclosure (5).

2. Commanding Officer's/Director's Interview

a. Prior to this interview, the Commanding Officer/Director shall be aware of results of the candidate's SRB/OQR and medical screenings. This interview is the final step in determining suitability for assignment to HRT instructor duty. Topics for discussion might be: willingness to assume supervisory duties, marital or financial problems, problems with supervisors, disciplinary problems, fighting, UA, civilian arrests, loss of temper, impulsive behavior, gambling, etc.

b. Based on screening results and this interview, the commanding officer/director will determine if the candidate should be assigned to a HRT instructor billet.

c. In the event an individual does not meet the requirements and/or fails the screening process, the formal school commander/director will contact the occupational field monitor for reassignment.

**Training.** All HRT instructors must undergo training and certification before being permitted to conduct any high-risk class without supervision.

1. Personnel will be required to demonstrate their technical competency, teaching techniques, and application of ORM per their commanding officer's/director's requirements. These evaluations shall be conducted by the academics chief and reviewed by the commanding officer/director or his designated representative (assigned in writing). A record of these evaluations shall be on file in the individual's training record. The following signed entry will be made in the individual's SRB/OQR:

"(Date): A review of (subject's name) medical record, service record, and training record has been completed. This individual has met all of the qualifications required and is hereby certified as a HRT instructor for course (Course ID Number) as of this date."

2. HRT instructors, teaching more than one high-risk course, do not need to certify in each course if the subject matter is similar. For courses that are dissimilar, commands shall require certification in each.

3. HRT instructors must be trained and currently qualified in CPR prior to being certified as a HRT instructor. A copy of the CPR card (front and back) shall be placed in the individual's training record.

**Proficiency Evaluations.** Proficiency evaluations shall be conducted quarterly for all HRT instructors to ensure that all aspects of ORM are being properly executed during training. Evaluations will be in accordance with the forms contained in reference (g).

**De-certification**

a. When there is sufficient cause to de-certify an HRT instructor, the recommendation will be forwarded (in writing) to the commanding officer/director. The authority to de-certify an instructor rests solely with the commanding officer/director. If the commanding officer/director agrees with the recommendation, the following signed entry will be made in the instructor's record book: "(Date): (subject's name) is de-certified as a high-risk instructor as of this date."

b. De-certification may be necessary for reasons that are not the fault of the individual (e.g., medical, etc.). In such cases the following entry will be made in the instructor's record book: "(Date): (subject's name) is de-certified as a high-risk instructor as of this date. This de-certification is through no fault of the individual."

**Re-certification.** Once an HRT instructor has been de-certified, he must be re-certified prior to being allowed to instruct. At a minimum, re-certification shall consist of a comprehensive review of the original de-certifying cause (and its current status) and a commanding officer's/director's appraisal interview. The need for retraining (classroom and practical) is to be determined by the command. A new certification entry must be made in the instructor's SRB.

## APPENDIX M

## Safety Definitions and Procedures

1. High-Risk Training (HRT) is defined in the formal school setting as: Basic or advanced individual or collective training, essential for preparing Marines and units for combat, that exposes students and instructors to the risk of death or permanent disability despite the presence and adherence to proper safety controls. Enclosure (4) is a list of courses designated as HRT.
2. Formal instruction is defined as training and education (consisting of formal courses of instruction) conducted by Marine Corps Formal Learning Centers. It may also encompass other formal schools and detachments whose curriculum falls under MCCDC's cognizance and/or review. Formal courses are identifiable by assigned course identification (CID).
3. Operational Risk Management (ORM) is the process of dealing with risks associated with military operations. It includes risk assessment, risk decision-making and implementation of risk controls. All formal HRT courses will incorporate ORM in their planning and execution in accordance with reference (i) to ensure safe training that also provides the realism needed to fulfill Marine Corps requirements.
4. Pre-Mishap Plan is to be implemented in the event of a mishap. A Pre-Mishap Plan shall be developed for all HRT evolutions and shall include (at a minimum) the following: procedures for summoning medical and other appropriate emergency response teams; locations of first aid kits, fire extinguishers, and any other on-site emergency equipment; procedures for emergency operation/shutdown of training equipment; backup communications procedures; sequential listing of personnel to be notified; and any other data as appropriate. All reasonable scenarios shall be anticipated and Standard Operating Procedures (SOP) developed to cope accordingly. The Pre-Mishap Plan shall be posted or otherwise available to all personnel at each HRT site. Students will be briefed on the Pre-Mishap Plan prior to commencing training. The plan will be reviewed upon completion of each course cycle.
5. A safety review is a comprehensive review of HRT to ensure courses are being taught with minimum risk to personnel. The safety review shall include the application of Operational Risk Management (ORM), review of training mishap data, near misses, curriculum, instructional techniques, and safety requirements incorporated within the course curriculum. Particular attention shall be paid to any course changes or modifications (physical, technical, and procedural) that may impinge on the overall safety posture. Safety reviews will be conducted on an annual basis, documented, and a report submitted to the Commanding Officer/Director.
6. The High-Risk Training Safety Officer (HRTSO) is an SNCO/officer or civilian employee designated (in writing) by the Commanding Officer/Director and responsible for the oversight of all HRT.
7. A High-Risk Instructor is an individual certified to instruct the high-risk portions of any course. Must be a graduate of the Formal Schools Instructor Course (FSIC) and hold a CPR, or higher lifesaving certification. Personnel currently assigned to this duty (or assigned within a period of

time not to exceed six months after the effective date of this Order), who do not meet these requirements, are exempted. See enclosure (2) for requirements.

8. A Cease Training (CT) signal is a verbal and/or non-verbal signal that has been agreed upon. It must be an easily remembered and easily recognized signal. The signal will be briefed to all students prior to commencing high-risk evolutions and posted in the immediate vicinity (if feasible). The signal is used to temporarily cease all training when, in the opinion of the signaler, a hazard exists that is likely to cause death of serious injury. See appendix (G) for details on CT procedures.

## APPENDIX N

## Risk Assessment Matrix

**Risk Assessment Matrix.** A matrix can be used to accomplish the second step of the ORM process. Using a matrix to quantify and prioritize the risks does not lessen the inherently subjective nature of risk assessment. However, a matrix does provide a consistent framework for evaluating risk. Although different matrices may be used for various applications, any risk assessment tool should include the elements of hazard severity and mishap probability. The RAC defined in the matrix represents the degree of risk associated with a hazard considering these two elements. While the degree of risk is subjective in nature, the RAC does accurately reflect the relative amount of perceived risk between various hazards. The example matrix described below is used in Naval Occupational Safety and Health assessments. Using the matrix the RAC is derived as follows:

a. **Hazard Severity** - An assessment of the worst credible consequence that can occur as a result of a hazard. Severity is defined by potential degree of injury, illness, property damage, loss of assets (time, money, personnel) or effect on mission. The combination of two or more hazards may increase the overall level of risk. Hazard severity categories are assigned as Roman numerals according to the following criteria:

(1) **Category I** - The hazard may cause death, loss of facility/asset or result in grave damage to national interests.

(2) **Category II** - The hazard may cause severe injury, illness, property damage, damage to national or service interests or degradation to efficient use of assets.

(3) **Category III** - The hazard may cause minor injury, illness, property damage, damage to national, service or command interests or degradation to efficient use of assets.

(4) **Category IV** - The hazard presents a minimal threat to personnel safety or health property, national, service or command interests or efficient use of assets.

b. **Mishap Probability** - The probability that a hazard will result in a mishap or loss, based on an assessment of such factors as location exposure (cycles or hours of operation), affected populations, experience or previously established statistical information. Mishap probability will be assigned a letter according to the following criteria:

(1) **Sub-category A** - Likely to occur immediately or within a short period of time. Expected to occur frequently to an individual item or person or continuously to a fleet, inventory or group.

(2) **Sub-category B** - Probably will occur in time. Expected to occur several times to an individual item or person or frequently to a fleet, inventory or group.

(3) **Sub-category C** - May occur in time. Can reasonably be expected to occur some time to an individual item or person or several times to a fleet, inventory or group.

(4) Sub-category D - Unlikely to occur.

c. Risk Assessment Code (RAC) - The RAC is an expression of risk that combines the elements of hazard severity and mishap probability. Using the matrix shown below, the RAC is expressed as a single arabic number that can be used to help determine hazard abatement priorities.

**RISK MATRIX**

		PROBABILITY of OCCURRENCE			
		A Likely	B Probable	C May	D Unlikely
<b>SEVERITY</b>	I Death, Loss of Asset	1	1	2	3
	II Severe Injury, Damage	1	2	3	4
	III Minor Injury, Damage	2	3	4	5
	IV Minimal Threat, Injury, or Damage	3	4	5	5

**Risk Assessment Code (RAC):**

- 1 = Critical risk
- 2 = Serious risk
- 3 = Moderate risk
- 4 = Minor risk
- 5 = Negligible risk

**Hazard Probability:**

- A - Likely to occur immediately or within a short period of time.
- B - Probably will occur in time.
- C - May occur in time.
- D - Unlikely to occur.

**Hazard Severity:**

- I - May cause death, loss of facility/asset.
- II - May cause severe injury, illness, or property damage.
- III - May cause minor injury, illness, or property damage.
- IV - Minimal threat.

## APPENDIX O

## Formal Learning Center Curriculum Developers Users Guide

**DESIGN PHASE****Learning Analysis Worksheet (LAW)**

This worksheet can be used to brainstorm knowledge and skills for each performance step during the Design Phase.

**Learning Analysis Worksheet Checklist**

A required item for the MLF that is used to evaluate the products of the learning analysis.

**Learning Objective Worksheet (LOW)**

This worksheet can be utilized to develop learning objectives, test items, and to determine the delivery system to be used.

**Learning Objective Worksheet Checklist**

A required item for the MLF that is used to evaluate learning objectives.

**Test Item Checklist**

The test itself is usually kept in a secure place, however this checklist may be placed in the MLF, though it is not a required item.

**Method Selection Grid Worksheet**

Used to ensure that the delivery system selected is compatible and placed in the MLF, however it is not a required item.



Learning Analysis Worksheet

**LEARNING ANALYSIS WORKSHEET**

T&R Event Duty Description:	
T&R Event Duty Code:	Date:
Task:	Task Code:
Condition(s):	
Standards(s):	
<b>Performance Steps:</b>	<b>Knowledge, Skills, Attitudes (KSA):</b>

## Learning Analysis Worksheet Checklist

<b>LEARNING ANALYSIS WORKSHEET CHECKLIST</b>	
1. Is the LAW dated when analysis occurred?	YES NO
2. Is the Task Designator/Event Code recorded from the T&R?	YES NO
3. Is the Task Behavior/Event Description recorded from the T&R?	YES NO
4. Is the Condition recorded from the T&R (paper-based only)?	YES NO N/A
5. Is the Standard recorded from the T&R (paper-based only)?	YES NO N/A
6. Are the performance steps verbatim from the T&R?	YES NO
7. Is there at least one KSA for each performance step?	YES NO
8. Are all knowledge and skills worded properly? ("Know how to... Be able to...")	YES NO
9. Are the grouped KSAs appropriate? (If the "grouping" is appropriate, the student will exhibit a single behavior that proves mastery of all the KSAs for that group.)	YES NO
10. Are <u>all</u> groupings annotated with a designator and a draft behavior statement?	YES NO
11. Which of the following methods were used to sequence the groups? (Circle <u>all</u> that apply.)	
a. Whole to part	
b. Part to whole	
c. Simple to complex	
d. Complex to simple	
e. Chronological (History)	
f. Sequential	
g. Cause and Effect order	
h. Critical	
i. Known to unknown	

**Remarks:**

Learning Objective Worksheet

### LEARNING OBJECTIVE WORKSHEET

Task Behavior:	
Event Code:	Date:
Downgrade Justification:	
Use a Learning Objective Worksheet for each learning objective.	
TLO/ELO (Circle one):	
Test Item/Evaluation:	
Method/Media:	

## Learning Objective Worksheet Checklist

<b>LEARNING OBJECTIVE WORKSHEET CHECKLIST</b>	
1. Are the LOW's dated (if using paper-based LOW)?	YES NO NA
<b>TERMINAL LEARNING OBJECTIVE</b>	
2. Was a TLO developed from the T&R?	YES / NO
3. Is the TLO condition(s) verbatim from the T&R?	YES / NO
4. If TLO condition has been modified, is there a downgrade justification explaining why (i.e. due to resource constraints)?	YES / NO
5. Is the TLO behavior verbatim from the T&R?	YES / NO
6. If TLO behavior has been modified, is there a downgrade justification explaining why (i.e. due to resource constraints)?	YES NO N/A
7. Is the TLO standard(s) verbatim from the T&R?	YES / NO
8. If TLO standard has been modified, is there a downgrade justification explaining why (i.e. due to resource constraints)?	YES / NO
<b>ENABLING LEARNING OBJECTIVES</b>	
9. Was an ELO developed for each group of KSAs on the LAW?	YES / NO
10. Is an alpha designator assigned to all ELOs?	YES / NO
11. Is the task behavior verbatim from the LAW?	YES / NO
12. Is the task designator verbatim from the LAW?	YES / NO
13. Are the LOs written using proper grammar?	YES / NO
14. Do LOs possess a single action verb?	YES / NO
15. Do LOs possess a single object?	YES / NO
16. Is the behavior observable and measurable?	YES / NO
17. If not, is there a modifier/qualifier ensuring an observable/measurable product?	YES NO N/A
18. Is the condition consistent with the behavior?	YES / NO

19. Does the condition describe the environment?	YES NO N/A
20. Does the condition describe aiding/limiting factors?	YES NO N/A
21. Is the standard consistent with the behavior?	YES / NO
22. Does the standard tell how well the student has to perform?	YES / NO
23. Are the LOs clear and concise?	YES / NO

**Remarks:**

STANDARD

## Test Item Checklist

**TEST ITEM CHECKLIST**

1. Do the test items replicate the conditions of the LO?	YES / NO
2. Do the test items replicate the standards of the LO?	YES / NO
3. Do the test items avoid measuring common knowledge?	YES / NO
4. Do the test items avoid common sense answers?	YES / NO
5. Does the student perform the behaviors as they are stated in the LOs?	YES NO N/A
6. Are the test items constructed in the proper format?	YES / NO
7. Are the test items free from ambiguity?	YES / NO
8. Are the test items closed to interpretation?	YES / NO
9. Do the test items avoid opinions?	YES NO N/A
10. Are the test items free of repeated words or phrases?	YES / NO
11. Does the test item avoid the use of absolutes (e.g. never, always)?	YES / NO
12. Are the test items written using proper grammar?	YES / NO
13. Is the test item as concise as possible?	YES / NO
14. Are the test items or their location annotated on the LOWs?	YES / NO
15. Are the answers (or their location) to the test items annotated on the LOWs?	YES NO N/A
16. If a performance-based test item, are there detailed instructions to the evaluator?	YES NO N/A
17. If a performance-based test item, are there detailed instructions to the student?	YES NO N/A
18. If a performance-based test item, do the detailed instructions to the evaluator identify the characteristics of a good product?	YES NO N/A

**Remarks:**

Method Selection Grid Worksheet

GRID KEY	PRESENTATION METHOD					STUDENT VERBAL INTERACTION METHODS			APPLICATION METHODS				
	Lecture (Formal, Informal Briefing, Student Speech)	Indirect Discourse (Panel Discussion, Dialogue, Teaching Interview)	Demonstration (Operation of Equipment, or System)	Reading (Books, Periodicals, Manuals, Handouts)	Self-Paced (Programmed, Modular, Computer Assisted, Mediated)	Questioning (Socratic Method, Student Query)	Discussion-Non Directed (Peer-Controlled Seminar Free Discussion)	Guided Discussion (Instructor Controlled)	Practical Application (Individual or Group)	Field Trips	Simulations (Role-Playing, Games)	Case Study	Coaching
<b>HR</b> - Highly Recommended <b>R</b> - Recommended <b>NR</b> - Not Recommended <b>NI</b> - Comprehension Level <b>EI</b> - Higher Level <b>LG</b> - Large Class <b>SM</b> - Small Class <b>Indiv</b> - Individual	<b>DOMAINS AND LEVELS</b>												
Higher Levels	NR	NR	NR	NR	R	R	NR	NR	HR	NR	HR	HR	NR
Comprehension	HR	HR	NR	R	HR	HR	NR	HR	R	NR	R	R	NR
Knowledge	HR	R	NR	HR	HR	NR	NR	NR	R	R	NR	NR	NR
<b>PSYCHOMOTOR</b>													
Higher Level	NR	NR	HR	NR	R	NR	NR	NR	HR	NR	R	NR	HR
Lower Level	NR	NR	HR	NR	R	NR	NR	NR	HR	NR	R	NR	HR
<b>AFFECTIVE</b>													
Higher Levels	NR	NR	NR	NR	NR	NR	NR	NR	NR	R	HR	HR	NR
Lower Levels	HR	HR	NR	R	R	R	R	HR	R	HR	HR	R	HR
<b>FACTORS AND CONSTRAINTS</b>													
Minimum Level of Instructor Expertise	NI	NI	EI	EI	EI	EI	N/A	EI	EI	NI	EI	EI	EI
Class Size 1 = indiv 2-12 = small 13-24 = medium 20+ = large	LRG/ MED	LRG/ MED	SM*	INDI V	INDIV	SM/ MED	MED	SM/ MED	IND IV/S M**	SM	SM/ MED	SM/ MED	IND IV/S M**
Evaluation Inherent in Method	NO	NO	YES	NO	YES	YES	NO	NO	YES	NO	YES	YES	YES
Responsive to Individual Needs	NO	NO	YES	YES	YES	YES	YES	YES	YES	NO	YES	YES	YES
** Consider breaking class into small groups if the number of students is large and there is instructional staff to support it.													

## DEVELOP PHASE

### Paper-based Concept Card

This worksheet can be used to consolidate information [i.e. lesson designator, lesson title, hours, method, training support equipment, Terminal Learning Objectives (TLOs), Enabling Learning Objectives (ELOs), and the references] for each lesson prior to entering the information into MCTIMS.

### Concept Card Checklist

A required item in the Master Lesson File (MLF) that is used to ensure that the proper items are on the concept card.

### Operational Risk Assessment Worksheet (ORAW)

The ORA worksheet documents the 5-step Operational Risk Management (ORM) process as it relates to the lesson.

### Lesson Plan

The lesson plan template provides the format for writing a lesson plan.

### Lesson Plan Checklist

A required item in the MLF, this checklist is used to ensure that the proper items are included in the lesson plan.

### Student Outline Checklist

Two examples of formats for student outlines are included. There is no standard format for a student outline. It should be developed with the student in mind.

### Instructor Preparation Guide Example

Illustrates the proper format for writing an Instructor Preparation Guide.

### Instructor Preparation Guide Checklist

A required element in the MLF, this checklist provides the instructor with information that is critical to the preparation for implementation of the lesson.

### MLF Required Items Checklist

A comprehensive list that details the documents and checklists that can be placed in the MLF.

### Method and Media Selection Checklist

Assists to confirm that the appropriate method/media is applied and available to the task/topic.

### ORAW Checklist

A required element in the MLF, this item is used evaluate the items on the ORAW.

### Media Checklist

Used to evaluate the applicability of the method and media. The media is required to be placed in the MLF.

### Test Checklist

Assists the instructor in confirming specific details that aid in successful test administration.

POI Checklist

Assists in confirming that specific details are included in the POI.

Program of Instruction (POI) Example

The POI provides a detailed summary of the course including instructional resources, class length, and curriculum breakdown. Additionally, the POI describes the course in terms of structure, delivery methods and media, length, intended learning objectives, and evaluation procedures. Contained within the POI is Course Descriptive Data (CDD).

Concept Card

<b>COURSE TITLE:</b>				<b>DATE:</b>			
<b>ANNEX:</b>				<b>ANNEX TITLE:</b>			
<b>LESSON ID:</b>				<b>LESSON TITLE:</b>			
<b>METHOD(S)</b>	<b>HOURS</b>	<b>S:RATIO</b>	<b>MEDIA:</b>				
<b>TOTAL HOURS:</b>							
<b>TERMINAL LEARNING OBJECTIVE(S) OR LESSON PURPOSE STATEMENT:</b>							
<b>ENABLING LEARNING OBJECTIVE(S):</b>							
<b>AMMUNITION REQUIREMENT(S):</b>			<u>Expended</u>		<u>Unexpended</u>		
<b>DODIC</b>	<b>NOMENCLATURE</b>	<b>UNITS PER STUDENT</b>	<b>UNITS FOR SUPPORT</b>	<b>UNITS PER STUDENT</b>	<b>UNITS FOR SUPPORT</b>	<b>UNIT OF ISSUE</b>	
<b>NOTES:</b>							
<b>REFERENCES:</b>						<b>REFERENCE#</b>	

## Concept Card Development

**Introduction**

We will be discussing the information necessary to develop concept cards. We will do this by covering the purpose, categories, elements of a concept card, and the steps in developing a concept card utilizing the Marine Corps Training Information Management System (MCTIMS).

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**Importance**

A Concept Card provides continuity of instruction by identifying the method, media, hours allowed, student/instructor ratio, TLO/ELOS, references, and/or any notes pertinent to the conduct of the lesson. By accounting for all of the aspects associated with a given course on their respective concept cards, this will accurately reflect the resources required to successfully conduct a course.

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**Learning Objectives**

**TERMINAL LEARNING OBJECTIVE:** Given a course structure and learning objectives, develop a concept card in accordance with the SAT Users Guide and 1553.2\_.

**ENABLING LEARNING OBJECTIVES:**

With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide, and the T3S Concept Card Checklist.

With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide, and the T3S Concept Card Checklist.

With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide, and the T3S Concept Card Checklist.

With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide, and the T3S Concept Card Checklist.

With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide, and the T3S Concept Card Checklist.

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## Concept Card Example

**UNITED STATES MARINE CORPS**  
Train The Trainer School  
Marine Corps Combat Service Support Schools  
PSC Box 20041  
Camp Lejeune, North Carolina 28542-0041

**DEVELOP A CONCEPT CARD**  
**STUDENT OUTLINE**

CD0203  
SEP 09

**What Will I Learn From This Class?**

1. **Terminal Learning Objective.** Given a course structure and learning objectives, develop a concept card in accordance with the SAT Users Guide.
2. **Enabling Learning Objectives**
  - a. With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide and the T3S Concept Card Checklist.
  - b. With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide and the T3S Concept Card Checklist.
  - c. With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide and the T3S Concept Card Checklist.
  - d. With the aid of references, given a course structure and learning objectives, record the required elements to establish a task oriented concept card in accordance with the SAT Users Guide and the T3S Concept Card Checklist.

**Let's Get Started!**

1. **Purpose.** Concept cards have both a primary and a secondary purpose. The primary purpose is to provide the school with a...

## Concept Card Checklist

<b>CONCEPT CARD CHECKLIST</b>	
1. Is the course title listed?	YES / NO
2. Is the appropriate annex listed? (check school S.O.P.)	YES / NO
3. Is the lesson ID correct?	YES / NO
4. Is the lesson title the same as listed on the course structure document?	YES / NO
5. Do the total hours for the concept card match the course structure document?	YES / NO
6. Are all methods and hours listed?	YES / NO
7. Is the student: instructor ratio appropriate for the method?	YES / NO
8. Are all forms of media listed? (not required for admin concept card)	YES NO N/A
9. Are ammunition requirements listed?	YES NO N/A
10. Are there explanatory notes that clarify information on the concept card or list additional resources required?	YES / NO
11. Are ALL the references used to write the lesson listed?	YES / NO
<b>ACADEMIC CONCEPT CARD ONLY</b> (Task oriented, lesson purpose or exam)	
12. Does the concept card contain ALL objectives or a lesson purpose statement?	YES / NO
13. Are the learning objectives listed in the order that they will be taught or evaluated? (not applicable if lesson purpose)	YES NO N/A
14. If this is an exam concept card, is there a re-test concept card as well?	YES NO N/A
<b>ADMINISTRATIVE CONCEPT CARD ONLY</b>	
15. Does the concept card describe the event in sufficient detail (e.g., check in, check out, graduation)?	YES / NO
16. Is this concept card in Annex Z?	YES / NO

**Remarks:**

Operational Risk Assessment Worksheet (ORAW)

SCHOOL:		COURSE:				
LESSON TITLE:		LESSON DESIGNATOR:				
PREPARED BY:		DATE:				
IDENTIFY HAZARDS		ASSESS HAZARDS	MAKE RISK DECISIONS	IMPLEMENT CONTROLS	SUPERVISE	
List Learning Objective Behaviors	Sub-steps (If applicable)	List Initial Hazards	Develop Controls	Residual RAC	How to Implement	How to Supervise
Cease Training Criteria (CTC): (During training, instructors may identify other hazards that require a decision to CT.)						
Approving Signature:		Date:				

Lesson Plan Example

**UNITED STATES MARINE CORPS**

(SCHOOL NAME)

(LOCAL COMMAND)

(COMMAND)

(SCHOOL ADDRESS)

(For USMC in heading; font size is 14 and in bold. For rest of heading; font size is 10)

(The address should be ALL CAPS)

(1-inch margins: top, bottom, left, and right)

**LESSON PLAN**

(Courier New, font size 18 for LESSON PLAN only. All other font size is 12.)

LESSON TITLE

LESSON DESIGNATOR

COURSE TITLE

COURSE ID

REVISED MM/DD/YYYY

(If lesson plan is the original version, then type the MM/DD/YYYY the lesson plan originated. If lesson plan is a revised version, then type REVISED MM/DD/YYYY).

APPROVED BY \_\_\_\_\_

DATE \_\_\_\_\_

**INTRODUCTION**

( MIN)

(Time cues are explained in the SAT and in the Curriculum Developer Course at T3S.)

(ON MEDIA # ) (Media may consist of PowerPoint slides, transparencies, turn charts, etc. If using PowerPoint, then ON SLIDE #1, ON SLIDE #2 etc. If using turn charts, then TURN CHART #1, etc. NOTE: Media cues are placed wherever they fall, even if it is within the text.)

(ON VIDEO "TITLE", VIDEO COUNTER #/SCENE #) (Provide the video counter number if VHS tape or the scene number if DVD in the media cue. If neither are available, provide a brief description of what segment of the video that is to be shown in an INSTRUCTOR NOTE.)

(OFF VIDEO "TITLE", VIDEO COUNTER #/SCENE #)

**1. GAIN ATTENTION.**

(A gain attention is provided along with other possible ideas. Lines are provided so that the instructor can personalize the gain attention to fit his/her personality.)

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(ON SLIDE # )

**2. OVERVIEW.** Good morning/afternoon class, my name is \_\_\_\_\_.  
[Overview contains the conceptual framework (outline/main ideas) that will be covered in the lesson. If applicable, it can also contain a statement that relates the lesson to previous learning/another lesson.]

**INSTRUCTOR NOTE**

Introduce learning objectives.

**3. LEARNING OBJECTIVES**

a. **TERMINAL LEARNING OBJECTIVE.** (List as on concept card. List ITE designator after each TLO.)

b. **ENABLING LEARNING OBJECTIVES.** (List as on concept card.)

(1) (List ITE designator after each ELO.)

(2)

**4. METHOD/MEDIA.** (Describe the delivery system that will be used.)

**INSTRUCTOR NOTE**

Explain Instructional Rating Forms to students.

**5. EVALUATION.** (Provide how, when, and where the students will be tested.)

**6. SAFETY/CEASE TRAINING (CT) BRIEF.** (If applicable) Lessons that involve risk of injury or damage to equipment must include a safety brief. This is explained more thoroughly in the SAT Users Guide and the 1553.2.

(ON SLIDE # )

**TRANSITION:** (Ensure understanding of what is being taught, how it is being taught, and the expectations. Then introduce first main idea. Provide a Transition for the instructor to use and provide lines for instructor personalization.)

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(ON SLIDE # )

**BODY**

( MIN)

(MAIN HEADING time cues are found at the INTRODUCTION, BODY, and SUMMARY. The MAIN HEADING time cues are right justified of the MAIN HEADING, bold, uppercase, and in parenthesis. Time cues are explained in the SAT Users Guide and in the Curriculum Developer Course at T3S.)

1. **MAIN IDEA #1.** ( Min) (Main idea time cues are located 2 spaces right of the main idea in bold, letters with parenthesis. Main ideas are bold, underlined, and uppercase.)

a. **Paragraph Heading.** [If no paragraph heading, then use natural case (meaning regular sentence text - first word capitalized). Paragraph headings are bold, underlined, and title case (meaning first letter of each word is capitalized).]

(1) **Paragraph Heading.** [If no paragraph heading, then use natural case (meaning regular sentence text - first word capitalized). Paragraph headings are underlined and title case per example above.]

(a) **Paragraph Heading**

1 **Paragraph Heading.** (To minimize confusion in following the outline, it is recommended that the use of these subparagraphs be minimized.)

a **Paragraph Heading.** (To minimize confusion in following the outline, it is recommended that the use of these subparagraphs be minimized.)

(ON TURN CHART # )

**INTERIM TRANSITION:** (Thus far, we've discussed main idea #1. Do you have any questions? Let's move on to a demonstration of ...)

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**INSTRUCTOR NOTE**

Perform the following demonstration.

(Guidance on the instructional method being used should be in a box and shaded at 12.5 shading. There should be one space between the instructor note and the teaching method.)

**DEMONSTRATION.** [Provide general information to include group size, if applicable, time, along with setup (handouts, turn charts, actual items to distribute, etc.) and the number of instructor(s) required based upon the concept card. Provide the purpose of the demonstration.]

**STUDENT ROLE:** (Describe in detail step-by-step instructions of what the student's role during the demonstration will be.)

**INSTRUCTOR(S) ROLE:** (Describe each Instructor's role.)

**1. Safety Brief: (If applicable)** (Brief students on safety precautions and what to do if there is a mishap.)

**2. Supervision and Guidance:** (Describe a detailed script of exactly what the instructor is doing during the demonstration.)

**3. Debrief: (If applicable)** (Allow students the opportunity to comment on what they experienced and/or observed. Provide overall feedback, guidance on any misconceptions, and review the learning points of the demonstration.)

**TRANSITION:** (Review, Probe, and Introduce next main idea. More explanation on how to write transitions is provided in the SAT Users Guide and in the Curriculum Developer Course taught at T3S. Provide a Transition for the instructor to use, but also provide lines for personalization.)

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(ON SLIDE # )

2. MAIN IDEA #2.

( Min)

(ON SLIDE # )

**INTERIM TRANSITION:** (So far, we've discussed main idea #2. Do you have any questions? If not, let's move on to the practical application of...)

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**INSTRUCTOR NOTE**

Introduce the following practical application.

**PRACTICAL APPLICATION.** [Provide general information to include group size, if applicable, time, along with setup (handouts, turn charts, actual items to distribute, etc.) and the number of instructor(s) required based upon the concept card. Provide the purpose of the practical application.]

**PRACTICE:** (Describe in detail step-by-step instructions of what the student's role in the practical application will be.)

**PROVIDE-HELP:** (Describe each Instructor's role.)

**1. Safety Brief: (If applicable)** (Brief students on safety precautions and what to do if there is a mishap.)

**2. Supervision and Guidance:** (Describe what the instructor is doing during the PA i.e. moving about the room, assisting students, answering questions.)

**3. Debrief: (If applicable)** (Allow participants opportunity to comment on what they experienced and/or observed. Provide overall feedback, guidance on any misconceptions, and review the learning points of the PA.)

**TRANSITION:** (Review, Probe, and Introduce next main idea. More explanation on how to write transitions is provided in the SAT Users Guide and the Curriculum Developer Course. Provide a Transition for the instructor to use, but also provide lines for personalization.)

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(BREAK - 10 Min) (Break cues are explained in the SAT Users Guide and in the Curriculum Developer Course at T3S.)

(ON SLIDE # )

3. MAIN IDEA #3. ( Min)

(ON HANDOUT # )

**INTERIM TRANSITION:** (Thus far, we've discussed main idea #3. Do you have any questions? If not, let's move on to the case study of ...)

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**INSTRUCTOR NOTE**

Introduce Case Study.

**CASE STUDY.** [Provide general information along with setup (handouts, turn charts, actual items to distribute, etc.) and the number of instructor(s) required based upon the concept card. Provide the purpose of the case study.]

**STUDENT ROLE:** (Describe in detail step-by-step instructions of what the student's role during the case study will be.)

**INSTRUCTOR(S) ROLE:** (Describe each Instructor's role.)

1. **Safety Brief:** (If applicable) (Brief students on safety precautions and what to do if there is a mishap.)
2. **Supervision and Guidance:** (Describe a detailed script of exactly what the instructor is doing during the case study.)
3. **Debrief:** (If applicable) (Allow participant opportunity to comment on what they experienced and/or observed. Provide overall feedback, guidance, and review the learning points of the case study.)

(ON SLIDE # )

**TRANSITION:** (Review, Probe, and Introduce next main idea. More explanation on how to write transitions is provided in the SAT Users Guide and the Curriculum Developer Course. Provide a Transition for the instructor to use, but also provide lines for personalization.)

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4. MAIN IDEA #4. ( Min)

(ON SLIDE # )

**TRANSITION:** (Review, Probe, and Introduce next main idea. More explanation on how to write transitions is provided in the SAT Users Guide and the Curriculum Developer Course. Provide a Transition for the instructor to use, but also provide lines for personalization.)

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**INSTRUCTOR NOTE**

Introduce the following practical application.

**PRACTICAL APPLICATION. ( Min)** (This is a special case where a method has its own time cue. Time cues are explained in the SAT Users Guide and the Curriculum Developer Course at T3S.)

[Provide general information to include group size, if applicable, along with setup (handouts, turn charts, actual items to distribute, etc.) and the number of instructor(s) required based upon the concept card. Provide the purpose of the practical application.]

**PRACTICE:** (Describe in detail step-by-step instructions of what the student's role in the practical application will be.)

**PROVIDE-HELP:** (Describe each Instructor's role.)

1. **Safety Brief: (If applicable)** (Brief students on safety precautions and what to do if there is a mishap.)
2. **Supervision and Guidance:** (Describe what the instructor is doing during the PA i.e. moving about the room, assisting students, answering questions.)
3. **Debrief: (If applicable)** (Allow participant opportunity to comment on what they experienced and/or observed. Provide overall feedback, guidance on any misconceptions, and review the learning points of the PA.)

**TRANSITION:** (Review, Probe, and Introduce next main idea. More explanation on how to write transitions is provided in the SAT Users Guide and the Curriculum Developer Course. Provide a Transition for the instructor to use, but also provide lines for personalization.)

**SUMMARY**

( MIN)

[Provide overview of main ideas covered (no questions should be asked here). Provide closure (relevance to job) and administrative instructions (IRF's, break).]

## Lesson Plan Checklist

<b>LESSON PLAN CHECKLIST</b>	
<b>TITLE PAGE</b>	
Is the school name and address present?	YES / NO
Is the document's title (lesson plan) present?	YES / NO
Is the lesson title present?	YES / NO
Is the lesson designator (ID) present?	YES / NO
Is the course title present?	YES / NO
Is the course identification number present?	YES / NO
Is the originating/revision date of lesson present?	YES / NO
Is an approval signature present?	YES / NO
<b>INTRODUCTION</b>	
1. Does the Gain Attention:	
Relate to the lesson?	YES / NO
Detract from the lesson?	YES / NO
Provide WIIFM for student?	YES / NO
Establish rapport?	YES / NO
2. Does the Overview:	
Contain the conceptual framework?	YES / NO
Describe the purpose of the lesson?	YES / NO
Relate to other instruction? (Recall previous learning)	YES / NO
3. Are the Learning Objectives:	
Noted in an instructor note for the instructor to introduce? (i.e. Students to read the LOs to themselves)	YES / NO

i. Verbatim from the Concept Card?	YES / NO
4. Does the Method/Media:	
a. Tell how the class will be presented?	YES / NO
b. Is there an instructor note mentioning the Instructional Rating Form (IRF)?	YES / NO
5. Does the Evaluation:	
a. State how the student will be evaluated (tested)?	YES / NO
b. Tell the student when they will be evaluated (tested)?	YES / NO
6. Are safety issues explained?	YES / NO
7. Is there a transition to the body?	YES / NO
<b>BODY</b>	
1. Are the main ideas in the same sequence as the learning objectives?	YES NO N/A
2. Do methods, other than lecture, provide:	
a. General information about the method including the amount of time that the method will take to execute?	YES / NO
b. Detailed instructions for what the student's role will be?	YES / NO
c. The instructor's role.	YES / NO
<ul style="list-style-type: none"> <li>■ Provide Safety Brief (if applicable) to inform students of any safety precautions related to the exercise and what to do if there's a mishap.</li> </ul>	YES NO N/A
<ul style="list-style-type: none"> <li>■ Provide Supervision and Guidance instructions to describe what the instructor is to be doing (i.e. moving about the room, assisting students, answering questions).</li> </ul>	YES / NO
<ul style="list-style-type: none"> <li>■ Provide Debrief (if applicable) instructions to comment on what was observed, provide overall feedback, additional guidance, and review learning points.</li> </ul>	YES NO N/A
3. Do Time Cues:	
a. Exist for each Main Heading? (Intro, Body, Summary)	YES / NO
b. For the Main Headings add up to the lesson time on the concept card?	YES / NO
c. Exist for each Main Idea?	YES / NO
d. Exist for methods that are not executed within a main idea? (There is no time cue required for a method that is within a main idea).	YES NO N/A
e. For the main ideas, methods (if method is not a part of a main idea), and breaks (that fall between main ideas) add up to the time cue for the Body?	YES NO N/A
f. Stand out from normal text?	YES NO N/A

4. Do/Are Media Cues:	
a. Stand out from normal text?	YES NO N/A
b. Identified by a number designator?	YES NO N/A
5. Are Break Cues written into the lesson?	
YES NO N/A	
6. Are Instructor Notes:	
a. Placed where needed throughout the lesson?	YES / NO
b. Clear and concise?	YES / NO
7. Are Transition(s):	
a. Between each main idea?	YES / NO
b. Does the transition summarize the last main idea, probe, and introduce the next main idea?	YES / NO
c. Between the last main idea and summary?	YES NO N/A
8. Are Interim Transition(s):	
a. Between the demo/practical application sessions?	YES NO N/A
b. Before and after breaks?	YES NO N/A
<b>SUMMARY</b>	
1. Does the Summary review the main ideas?	YES / NO
2. Review each main idea without re-teaching?	YES / NO
3. Refrain from presenting any new material?	YES / NO
4. Provide closure? (Reaffirm importance of content.)	YES / NO
5. Provide closing instructions?	YES / NO
6. Contain instructions for Instructional Rating Forms (IRF)?	YES / NO
<b>ENTIRE CLASS</b>	
1. Is the lesson detailed enough that all information can be covered by a first-time instructor?	YES / NO

## Student Outline Checklist

<b>STUDENT OUTLINE CHECKLIST</b>	
1. Learning Objectives - Are they verbatim from the concept card?	YES / NO
2. Outline -- Does it follow conceptual framework?	YES / NO
3. References -- are all the references used in the lesson annotated on the last page?	YES / NO
4. Is the student outline written as if addressing the student?	YES / NO
5. Is the font size at least 10?	YES / NO
6. Is the text easy to read?	YES / NO
7. Is there ample white space (margins) for the student to take notes?	YES / NO
8. Do exercises or activities match those in the lesson plan?	YES NO N/A
<b>SUPPLEMENTAL STUDENT MATERIALS</b>	
1. Is the material relevant to the learning objectives?	YES / NO
2. If intended as a job aid, is it durable (e.g. laminated)?	YES / NO

**Remarks:**

Instructor Preparation Guide Example

UNITED STATES MARINE CORPS  
(SCHOOL NAME)  
(LOCAL COMMAND)  
(COMMAND)  
(SCHOOL ADDRESS)

INSTRUCTOR PREPARATION GUIDE

- LESSON TITLE:** (As on concept card)
- LESSON DESIGNATOR:** (As on concept card)
- TOTAL LESSON TIME:** (As on concept card)
- REFERENCES:** (List references from concept card)
- LOCATION OF TEST:** (List where the test is located)
- PERSONNEL REQUIRED:** (List as listed on concept card  
i.e. instructors, support personnel, Corpsman)
- FACILITIES:** (List as listed on concept card i.e. classroom,  
laboratory, ranges, etc.)
- REVIEW COURSE MATERIALS:**
- Review the course/training schedule, administrative requirements, student background information, lesson plans, student materials, media, and evaluations (tests).
- ADD PERSONALIZATION:**
- Personalize the lesson plan by adding subject matter detail, relating personal experiences, providing examples, questions, and/or interactive techniques.
- MATERIALS/EQUIPMENT:** Make a checklist of items that the instructor needs for the lesson (i.e. Models, Mock-ups, training aids, audio-visual equipment).  
Example:
- DVD
- EXERCISE SETUP AND PLANNING:** List exercises (i.e. Demonstrations, Practical Applications), and the setup and planning involved for each specific to the lesson. Describe as a step-by-step process.  
Example:
- Demonstration
- -
- SAFETY:**
- Review ORA in Master Lesson File
  - Reassess the environment for changes that affect the original ORA. Document any additional considerations/controls on the After Instruction Report (AIR) for future reference.

APPROVING SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

## Instructor Preparation Guide Checklist

**INSTRUCTOR PREPARATION GUIDE (IPG) CHECKLIST**

1. Is the lesson title the same as on the concept card?	YES / NO
2. Is the lesson designator the same as on the concept card?	YES / NO
3. Is the total lesson time the same as on the concept card?	YES / NO
4. Are all references the same as on the concept card?	YES / NO
5. Is the location of tests identified?	YES / NO
6. Are all personnel required the same as on the concept card?	YES / NO
7. Are all facilities required the same as on the concept card?	YES / NO
8. Are all course materials that need to be reviewed listed?	YES / NO
9. Is there a step to personalize the lesson plan?	YES / NO
10. Are all materials and equipment needed to conduct the lesson listed?	YES / NO
11. Are there detailed instructions for the setup and planning of each exercise?	YES / NO
12. Are all safety precautions related to lesson listed?	YES / NO

**Remarks:**

## Master Lesson File Required Items Checklist

<b>MASTER LESSON FILE CHECKLIST</b>	
<b>MASTER LESSON FILE REQUIRED ITEMS</b>	
1. Learning Analysis Worksheet Checklist	YES / NO
2. Learning Analysis Worksheets	YES / NO
3. Learning Objective Worksheet Checklist	YES / NO
4. Learning Objective Worksheet	YES / NO
5. Test Item Checklist	YES / NO
6. Method and Media Selection Checklist	YES / NO
7. Concept Card Checklist	YES / NO
8. Concept Card	YES / NO
9. Operational Risk Assessment Worksheet (ORAW) Checklist	YES / NO
10. Operational Risk Assessment Worksheet (ORAW)	YES / NO
<b>11. Lesson Plan Checklist</b>	YES / NO
12. Lesson Plan	YES / NO
13. Student Outline/Student Supplementary Materials Checklist	YES / NO
14. Student Outline	YES / NO
15. Student Supplementary Materials	YES NO N/A
16. Media Checklist	YES / NO
<b>17. Media (paper copy or explanation of where the media is located)</b>	YES / NO
18. Instructor Preparation Guide (IPG) Checklist	YES / NO
19. Instructor Preparation Guide (IPG)	YES / NO
<b>OTHER COURSE DEVELOPMENT ITEM/CHECKLIST</b>	
1. Test*	YES / NO
2. Test Checklist	YES / NO

\* The test needs to be maintained in a secure place with limited access. Therefore, it is recommended that this item be placed somewhere other than the MLF.

Remarks:

## Method and Media Selection Checklist

**METHOD AND MEDIA SELECTION CHECKLIST**

1. Is the method selection consistent with the learning objective behavior?	YES / NO
2. Is the media selection consistent with the learning objective behavior?	YES / NO
3. Is the method selection consistent with the level of learning?	YES / NO
4. Is the media selection consistent with the level of learning?	YES / NO
5. Is the media selected appropriate for the class size?	YES / NO
6. Is the method appropriate for the class size?	YES / NO
7. Is the method appropriate for the task(s)/topic?	YES / NO
8. Is the method and media (combined) appropriate for the target population?	YES / NO
9. Does the method and media (combined) compliment different learning styles (auditory, visual, and tactile)?	YES / NO
10. Does the method provide students the opportunity to practice their skills in a safe environment?	YES NO N/A
11. Is the method reflective of how the student will be evaluated?	YES NO N/A
12. Are the resources required to implement the method available to the school?	YES / NO
13. Are the resources required to implement the media available to the school?	YES / NO

**Remarks:**

## Operational Risk Assessment Worksheet Checklist

**OPERATIONAL RISK ASSESSMENT (ORA) WORKSHEET CHECKLIST**

1. Is the lesson title and lesson designator on the ORA worksheet?	YES / NO
2. Are all learning objective behaviors listed?	YES / NO
3. Are sub-steps to the learning objective behaviors listed?	YES NO N/A
4. Have hazards been listed for the learning objective behaviors/sub-steps?	YES NO N/A
5. Have realistic controls been formulated for all listed hazards? (Available resources must be considered.)	YES NO N/A
6. Do the controls change the RAC code to an acceptable level?	YES NO N/A
7. Is it explained on the ORA worksheet how to implement the controls?	YES NO N/A
8. Is it explained on the ORA worksheet how to supervise?	YES NO N/A
9. Is the Cease Training Criteria (CTC) provided?	YES NO N/A
10. Is there an approving signature and date on the ORA Worksheet?	YES / NO

**Remarks:**

## Media Checklist

**MEDIA CHECKLIST**

1. Does the media enhance the information in the lesson plan?	YES / NO
2. Is the alignment used appropriate to the type of media?	YES / NO
3. Is the use of upper-case lettering minimized (only used for titles or to highlight text)?	YES / NO
4. Are the images used related to the content?	YES / NO
5. Does the page or frame refrain from clutter/image overload?	YES / NO
6. Do the colors contrast well?	YES NO N/A
7. Is the appropriate level of vocabulary used?	YES / NO
8. Has the media been checked for spelling and grammar?	YES / NO
9. Do terms in the media match terms in the student outline?	YES / NO
<b>PRINT MEDIA</b>	
10. Is the font size at least 10?	YES / NO
11. Is the text style consistent (headings, text, etc.)?	YES / NO
12. Is the format/layout consistent (spacing)?	YES / NO
13. Is there ample white space (margins)?	YES / NO
14. Is the text easy to read?	YES / NO
<b>PROJECTED MEDIA</b>	
15. Are sans serif fonts (without finishing strokes) used?	YES / NO
16. Is the font size large enough to be seen by all (at least 24 for projected media)?	YES / NO
17. Is information bulleted using key words and phrases?	YES / NO
18. Are no more than six words a line and six lines (6X6 rule) per visual used?	YES / NO
19. Is the animation distracting within the presentation?	YES NO N/A
20. Is the sound distracting within the presentation?	YES NO N/A
21. Is the layout consistent throughout the presentation?	YES / NO

**Remarks:**

## Test Checklist

<b><u>TEST CHECKLIST</u></b>	
1. Does it contain detailed instructions to the instructor?	YES NO N/A
2. Are there instructions to the evaluator concerning scoring?	YES / NO
3. Does it contain detailed instructions to the student?	YES / NO
4. Are there instructions covering the consequences of cheating?	YES / NO
5. Does it state the safety precautions?	YES / NO
6. Is the purpose of this test clear?	YES / NO
<b>PERFORMANCE-BASED TEST</b>	
7. Does it identify the task to be completed?	YES / NO
8. Does it contain a checklist of steps to be evaluated OR criterion of a good product?	YES / NO
<b>KNOWLEDGE-BASED TEST</b>	
9. Are there an appropriate number of test items for each objective?	YES / NO
10. Are all like test items grouped by type (Fill-in-the-blank, multiple choice, etc...)?	YES / NO
11. Have they been compared to the rest of the test to ensure they are:	
a. Free of hints?	YES / NO
b. Not repeated elsewhere?	YES / NO
c. Consistent in format with like test items?	YES / NO
12. Are items on the test verbatim from the LOWs?	YES / NO
13. Is this test valid? (Does it measure what it is supposed to measure?)	YES / NO
14. Is this test usable? (easy to administer, score and interpret the results)	YES / NO

**Remarks:**

Program of Instruction Checklist

<b>PROGRAM OF INSTRUCTION (POI) CHECKLIST</b>			
COURSE NAME:		CID:	
CHECKED BY:		DATE:	
<b>REQUIRED DOCUMENTATION: CURRENT APPROVED POI , CORRESPONDING T&amp;R MANUAL(S)/TIP/MOS MANUAL</b>			
ITEM	Y	N	REMARKS
<b>COVER LETTER/ROP</b>			
Cover letter (or endorsement letter) and ROP			
Ensure POI Review Checklist is complete and signed.			
<b>PREFACE – PAGE III</b>			
Reflects course purpose, graduates' information, and POC.			
<b>SECTION I – COURSE DESCRIPTIVE DATA</b>			
COURSE TITLE: Reflects complete course title listed in student registrar/TIP. (1)			
LOCATION: Reflects school name and location address. (2)			
COURSE ID: Reflects CID listed in student registrar/TIP. (3)			
OTHER SERVICE COURSE NUMBER (OSCN): Reflects OSCN, if applicable. (4)			
MILITARY ARTICLES AND SERVICE LIST NUMBER (MASL): Reflects MASL if applicable. (Courses approved for International students receive a MASL Number.) (5)			
PURPOSE: Reflects course intent. (6)			
SCOPE: Reflects all areas of instruction. (7)			
LENGTH (PEACETIME): Reflects total number of training days. (8)			
CURRICULUM BREAKDOWN (PEACETIME): Reflects total academic/administrative hours - ensure that all categories contain designated hours. Each academic day will be at least 7 academic hours long. (9)			
LENGTH (MOBILIZATION): Reflects training length – use 10 hours/6 days per week calculation. (10)			
CURRICULUM BREAKDOWN (MOBILIZATION): Reflects peacetime curriculum breakdown, unless otherwise noted. (11)			
MAXIMUM CLASS CAPACITY: Reflects maximum class capacity (consistent with TIP) (12)			
OPTIMUM CLASS CAPACITY: Reflects optimum class capacity. (13)			
MINIMUM CLASS CAPACITY: Reflects minimum class capacity. (14)			
CLASS FREQUENCY: Reflects course iterations (consistent with TIP, unless additions or deletions). (15)			
TARGET POPULATION DESCRIPTION/PREREQUISITES: Reflects Target Population Description and Prerequisites - see MOS manual. (16)			
MOS RECEIVED: Reflects MOS received, if applicable. (17)			
OCCUPATIONAL FIELD MANAGER: Reflects agency managing course quotas. (18)			
FUNDING: Reflects MILPERS, TECOM (C464) or Unit funded. (19)			
REPORTING INSTRUCTIONS: Reflects reporting instructions and messing/billeting notes. (20)			
INSTRUCTOR STAFFING REQUIREMENTS: Reflects instructor billets and corresponding comments. (21) (See Appendix A for Instructor Computation Worksheet (ICW))			
SCHOOL OVERHEAD REQUIREMENTS: Reflects school overhead billets and corresponding comments. (22)			
TRAINING SUPPORT REQUIREMENTS: Reflects all facility/equipment/ammunition required to conduct one iteration of the course and corresponding comments. (23)			
TASK LIST: See Appendix B. (24)			

<b>SECTION I - APPENDIX A - INSTRUCTOR COMPUTATION WORKSHEET (ICW)</b>		
ICW notes should state how many instructors are required - if different from the ICW calculation. Additionally, if more instructors are required than the ICW number of instructors, identify where additional instructors will come from.		
<b>SECTION I - APPENDIX B – TASKLIST</b>		
TASK LIST reflects all current, signed T&R Manual events and does not include events not in the applicable T&R manual. Includes relevant comments. Includes required VBT		
<b>SECTION II - SUMMARY OF HOURS</b>		
Present.		
<b>SECTION III - SCOPE OF ANNEXES</b>		
Each Annex is complete and reflects the purpose of each annex.		
<b>SECTION IV - CONCEPT CARDS</b>		
LOCATION OF LEARNING OBJECTIVES REPORT: Ensure every Learning Objective (LO) is assigned to a concept card and ALL LOs are taught and evaluated. All TLOs will include at least two ELOs		
<b>SECTION IV - INDIVIDUAL CONCEPT CARDS</b>		
Reflects Lesson title.		
Reflects appropriate annex.		
Ensure total hours are appropriate for each lesson.		
Reflects all methods/hours.		
Ensure student-to-instructor ratio is appropriate for each method – reflect Maximum class capacity only.		
Reflects required media necessary to conduct class.		
Reflects required ammunition, if applicable.		
Ensure concept cards contain either LOs or Lesson Purposes.		
Ensure Terminal Learning Objectives (TLOs) contain condition, one behavior and standard verbatim from T&R event. If not, ensure Downgrade justifications are included for tasks that cannot be performed to standard. Downgraded TLOs should reflect behaviors expected from students – in the classroom environment.		
Ensure ELOs contain condition, one behavior and standard.		
Ensure all references required to conduct a class are listed.		
Ensure Administrative cards describe event in detail (check-in, check-out, graduation) – located in Annex Z.		
<b>SECTION V- STUDENT PERFORMANCE EVALUATION</b>		
Describes purpose and method(s) of the student's evaluation.		
Describes remediation procedures and what happens if student fails remediation.		
Describes course mastery/graduation criteria.		
Includes list and location in the POI where all events in the task list are performed to standard and which events are downgraded.		
<b>SECTION VI - DISTRIBUTION LIST</b>		
Ensure Distribution List reflects agencies where the POI is to be distributed – minimum distribution should reflect: COMMARFORRES/COMMARFORLANT/COMMARFORPAC and Marine Corps Institute (MCI).		
<b>USEFUL INFORMATION</b>		
To find calendar days - divide training days by 5 and multiply by 7 = estimated calendar days		
To find training days - divide calendar days by 7 and multiply by 5 = estimated training days		
Average length of a training day = total academic hours divided by training days		
TAD = 139 calendar days or less PCS = 140 calendar days or more		
Funding - (PCS = MILPERS) (TAD = TECOM (C 464) or unit funding)		

## **IMPLEMENT PHASE**

### **Instructor Evaluation Checklist**

Used by instructors to evaluate a fellow instructor during the presentation of a course (evaluators need to possess the same or advanced instructor qualifications as those being evaluated).

### **Lesson Observation Checklist**

Used while a class is in session to evaluate the effectiveness of course materials.

### **Lesson Environment Checklist**

Used to evaluate the instructional environment.

### **Lesson Safety Review Checklist**

Used in either the preparation of a class/practical application or to ensure safety measures have been properly employed for a lesson.

Instructor Evaluation Checklist

INSTRUCTOR EVALUATION CHECKLIST						
NAME:		RANK:		DATE:		
COURSE:			LESSON TITLE:			
EVALUATION:		<input type="checkbox"/> Rehearsal 1 2 3 <input type="checkbox"/> Quarter 1 2 3 4		<input type="checkbox"/> Presentation <input type="checkbox"/> Certification (if applicable)		
<b>INSTRUCTIONS:</b> Evaluate each item on the checklist as <b>YES, NI, (Needs Improvement), NO or NA (Not Applicable).</b>						
1. INTRODUCTION		YES	NI	NO	NA	COMMENTS
a. <b>Gain Attention.</b> Presented effectively; relates to LOs						
b. <b>WIIFM.</b> Established need for students to listen.						
c. <b>Overview.</b> Identified purpose of lesson and main points.						
d. <b>Learning Objectives.</b> Introduced the learning objectives.						
e. <b>Method/Media.</b> Identified specific method(s)/media used.						
f. <b>Administrative Instructions.</b> IRF's, any other rules, etc.						
g. <b>Evaluation.</b> Identified how and when evaluation would occur.						
h. <b>Transition.</b> Closed introduction and opened main idea.						
i. <b>Safety Brief (if applicable).</b> Safety precautions/controls and Cease Training Criteria are explained.						
2. BODY		YES	NI	NO	NA	
a. <b>Lesson Plan.</b> Followed lesson plan.						
b. <b>Examples.</b> Clarified teaching points through use of examples.						
c. <b>Transitions.</b> Closed main idea and opened next.						
d. <b>Probed.</b> Used questions to check learning in transitions.						
3. SUMMARY		YES	NI	NO	NA	
a. <b>Review Main Ideas.</b> Reviewed conceptual framework.						
b. <b>Provide Closure.</b> Reaffirm importance of content.						
c. <b>Closing Instructions.</b> Clear and concise.						
4. PROBING/QUESTION & ANSWER TECHNIQUES		YES	NI	NO	NA	
a. <b>Probing.</b> Used probing questions throughout.						
b. <b>Response.</b> Responded effectively to student's questions/inputs.						
c. <b>Response.</b> Responded to areas of confusion.						
d. <b>Questioning Techniques.</b> Assessed student learning.						
5. FACILITATION TECHNIQUES		YES	NI	NO	NA	
a. <b>Real World.</b> Provided real world relevancy.						
b. <b>Participation.</b> Encouraged student participation.						
c. <b>Interaction.</b> Provided intellectual stimulation with students.						
d. <b>Motivation.</b> Used motivation techniques to monitor activity progress toward meeting lesson purpose.						
e. <b>Focus.</b> Established and maintained student attention.						
f. <b>Instructions.</b> Clear and concise for exercises/PA's						
6. METHOD		YES	NI	NO	NA	
a. <b>Method employment.</b> States purpose and desired outcome. Employs effectively.						
b. <b>Safety Brief (if applicable).</b> Safety precautions, Cease Training Criteria, and emergency action procedures are explained.						
c. <b>Supervision and Guidance.</b> Instructions and guidance to students is adequately provided.						
d. <b>Debrief (if applicable).</b> Overall feedback; review of learning points.						



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**INSTRUCTOR IMPROVEMENT PLAN**

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I have been debriefed on this evaluation. I understand the areas that need improvement and will take the following action:

EXAMPLE

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SIGNATURE AND TITLE OF INSTRUCTOR  
DATE

---

Lesson Observation Checklist

**OBSERVATION CHECKLIST**

**OBSERVATION CHECKLIST:** An observer completes this checklist while observing the lesson. This checklist is designed as a source of quality control as well as evaluate the effectiveness of the materials during implementation.

**INSTRUCTIONS:** Check the appropriate box: YES, NO, or N/A. If you answer "NO" to a question, note the item number with a comment for clarification and state a recommendation.

**COURSE:** \_\_\_\_\_

**OBSERVER/TITLE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

<b>A. COURSE MATERIAL</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
1. Is the lesson plan the instructor uses the same as in the MLF?			
2. Is the student outline the student uses the same as in the MLF?			
3. Is the media the same as in the MLF? (Any modifications should be noted.)			
4. Are all supplemental student materials used the same as in the MLF?			
5. Are adequate directions for all supporting materials used located in the MLF?			
6. Has Operation Risk Assessment Worksheet (ORAW) been updated within the last year?			
7. Is the ORAW still accurate?			
8. Is the Instructor Preparation Guide still accurate?			
<b>B. LESSON PLAN</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
9. Is the Gain Attention relevant to the learning objectives?			
10. Does the lesson being taught reflect a logical sequence of the material?			
11. Based upon viewing the lesson, are the lesson plans written with sufficient content so that any instructor can teach the class if needed?			
12. Do the instructor notes provide sufficient directions for the instructor?			
13. Are the activities/exercises in the lesson meaningful? (Do students seem to be learning from them?)			
14. Are the activities/exercises appropriately placed in the lesson?			
15. Are the method(s) effective to teaching the lesson content?			
16. Is the method used to teach students reflective of how students will be evaluated?			
<b>C. STUDENT MATERIALS</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
17. Are the student materials easy to read?			
18. Are the student materials easy to follow?			
19. Can the students take the materials home?			
20. Are the students using the materials?			
<b>D. MEDIA</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
21. Is the media visually appealing?			
22. Is the media large enough for all to see?			
23. Does the media compliment the lesson?			
<b>E. FACILITIES/EQUIPMENT</b>			
24. Are the facilities used conducive to the type of training?			
25. Is the equipment used adequate for the purposes of training?			

**Comments/Recommendation (Write item number and then comment/recommendation):**

**OBSERVER SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**LESSON TITLE:** \_\_\_\_\_

Lesson Environment Checklist

<b>ENVIRONMENT CHECKLIST</b>
<b>ENVIRONMENT CHECKLIST:</b> An instructor or an observer can complete this checklist. An instructor may use the checklist to ensure classroom management. An observer may use it to evaluate the management of the instructional environment.
<b>INSTRUCTIONS:</b> Check the appropriate box: YES, NO or N/A (not applicable). If you answer "NO" to a question, note the item number with a comment for clarification and state a recommendation.

**COURSE:** \_\_\_\_\_

**INSTRUCTOR/OBSERVER:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

<b>A. TRAINING ENVIRONMENT</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
26. Is the instructional area well-ventilated (i.e. heat, hazardous fumes)?			
27. Is the lighting sufficient in the instructional area for the instruction and/or task?			
28. Is the temperature comfortable?			
29. Is noise minimized?			
30. Are distractions minimized?			
31. Are safety signs (i.e. hard hat area, welding in progress) visibly posted?			
32. Is safety equipment available and/or being used?			
33. Is the training facility clean?			
34. Is there adequate space for planned activities?			
35. Is the facility set up so that all students can view media, demonstrations, etc?			
<b>B. TRAINING CONDITIONS</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
36. Are training aids and equipment operating effectively?			
37. Do training support personnel perform their duties properly?			
38. Is the support appropriate to requirements?			
<b>C. VISITOR/OBSERVER PREPARATION</b>	<b>YES</b>	<b>NO</b>	<b>N/A</b>
39. Is there a designated place for an observer station?			
40. Is there a Visitor/Observer Folder available in accordance with SOP policy?			

**Comments/Recommendations (Write item number and then comment/recommendation):**

**INSTRUCTOR/OBSERVER SIGNATURE:** \_\_\_\_\_ **DATE** \_\_\_\_\_

**LESSON/PRACTICAL APPLICATION TITLE:** \_\_\_\_\_

Lesson Safety Review Checklist

**SAFETY REVIEW CHECKLIST**

**SAFETY REVIEW CHECKLIST:** An instructor or an observer can complete this checklist. An instructor may use it in preparation for a lesson/practical application. An observer may use it to ensure that safety concerns are addressed appropriately and in accordance with Operation Risk Management. (Safety procedures/measures include, but are not limited to, heat stress control procedures, respiratory protection, sight protection, hearing protection, hand protection, head protection, foot protection, etc.)

**COURSE:** \_\_\_\_\_

**INSTRUCTOR/OBSERVER:** \_\_\_\_\_

**DATE:** \_\_\_\_\_

**INSTRUCTIONS:** Check the appropriate box: YES, NO, or N/A. If you answer "NO" to a question, note the item number with a comment for clarification and state a recommendation.

COMPLETE AS APPLICABLE	YES	NO	N/A
41. Instructor training completed.			
42. Instructors are present in sufficient numbers to prevent accidents during potentially hazardous or dangerous situations.			
43. Facilities ensure a safe working environment.			
a. Inspections of fire extinguishers are up to date.			
b. Exits are labeled and accessible.			
c. Area has appropriate ventilation for fumes.			
44. An Operational Risk Assessment Worksheet (ORAW) has been completed for the lesson and is located in the Master Lesson File (MLF).			
45. Hazard controls to eliminate or minimize potential risks are included in the instructor preparation guide and/or the detailed outline (lesson plan) for the lesson.			
46. Cease Training Criteria and procedures are thoroughly explained on the ORAW.			
47. Tools and equipment are in good working condition and safe to use.			
48. Training evolutions that require students to perform hazardous tasks are essential to accomplish learning objectives.			
49. Applicable safety procedures/protective measures are in place.			
50. A Training Safety Officer (TSO) has been assigned to high risk training events.			
51. Setback information (academic or personal issues) on students is available to the instructor.			

**Comments/Recommendation (Write item number and then comment/recommendation):** \_\_\_\_\_

**INSTRUCTOR/OBSERVER SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**LESSON/PRACTICAL APPLICATION TITLE:** \_\_\_\_\_

## EVALUATION PHASE

### Instructional Rating Form

A form that at least 10 percent of students complete immediately following each lesson.

### Examination Rating Form

A form that at least 10 percent of students complete immediately following each examination.

### End of Course Critique

A questionnaire that 100 percent of students complete at the end of a course.

### After Instruction Report

The primary means of an instructor assessing the effectiveness of instruction that comprises data from several different sources.

### Post Graduate Survey

A questionnaire sent (i.e. email, mailed via postal service, available online) to course graduates approximately 3 months following completion of the course.

### Post Graduate Supervisor Survey

A questionnaire sent (i.e. email, mailed via postal service, available online) to the supervisors of course graduates approximately 3 months following the graduate's completion of the course.

### Safety Questionnaire

A form given to students to assess whether the student has been informed about safety issues.

### School SOP Checklist

Assists the FLC in developing and ensuring that key elements are present in their schools SOP.

### Sample Evaluation Plan/Graduate Job Performance

A generic evaluation plan that contains various data elements that will aid a school in constructing a specific evaluation plan.

### Sampling Table

Used to determine how many questionnaires need to be sent out to approximate the desired return rate

Instructional Rating Form

**INSTRUCTIONAL RATING FORM**

One way instruction is improved is by sampling student reaction to the instruction. To assist in improving this lesson, please answer the following questions. This will assist the school in improving our courses.

Instructor:

Date:

Course:

Lesson:

**INSTRUCTIONS:** Circle the answer that indicates your level of agreement or disagreement as follows: Strongly Disagree=1, Disagree=2, Agree=3, and Strongly Agree=4. Please explain in the section labeled comments any ratings of 1 or 2. If the question is not applicable, then circle NA.

	Strongly Disagree	Disagree	Agree	Strongly Agree	NA
<b>1. INSTRUCTOR</b>					
a. The instructor showed a thorough knowledge of the lesson material.	1	2	3	4	NA
b. The instructor communicated the lesson material in a way that could be easily understood.	1	2	3	4	NA
c. The instructor gave precise instructions concerning in-class exercises.	1	2	3	4	NA
d. The instructor encouraged student participation.		2	3	4	NA
e. Student's questions were answered in a professional (not demeaning to the student) manner.	1	2	3	4	NA
<b>2. LESSON CONTENT</b>					
a. The content was presented at the right pace.		2	3	4	NA
b. The student outline aided my understanding of the content covered.		2	3	4	NA
c. The environment of the class was interactive.	1	2	3	4	NA
<b>3. SAFETY</b>					
a. Lesson related safety to job performance.		2	3	4	NA
b. Cease Training procedures were adequately explained.	1	2	3	4	NA
c. Safety precautions were reemphasized prior to commencing tasks.	1	2	3	4	NA
d. Safety was paramount at all times.	1	2	3	4	NA
e. Equipment/material was safe for use.	1	2	3	4	NA
<b>4. METHODS/MEDIA:</b>					
a. The in-class exercises required in the course were worthwhile learning experiences.	1	2	3	4	NA
b. The way that the class material was presented enhanced my ability to learn/perform the concept/task. I especially liked the _____ method.	1	2	3	4	NA
c. The media complimented instruction.	1	2	3	4	NA
<b>5. STUDENT: Circle the answer that best describes your knowledge level.</b>					
a. My knowledge of the content prior to this class was	None	Very Little	Average	Above Average	Expert
b. My knowledge of the content after completing the class was	None	Very Little	Average	Above Average	Expert

Name:

Parent Unit:

**Overall Comments/Suggestions for the Class (use back of form if more space is needed):**

Examination Rating Form

**EXAMINATION RATING FORM**

One way that we improve the examination process is by sampling student reaction to the examination. To assist in improving this process, please answer the following questions. These forms will not be viewed until after all tests have been scored and returned.

<b>Name:</b>	<b>Date:</b>
<b>Course:</b>	<b>Exam:</b>

**A. INSTRUCTIONS:** Circle the answer that indicates your level of agreement or disagreement as follows: Strongly Disagree=1, Disagree=2, Agree=3, and Strongly Agree=4. Please explain in the section labeled comments any ratings of 1 or 2. If the question is not applicable, then circle NA.

PRIOR TO TEST:	Strongly Disagree	Disagree	Agree	Strongly Agree	N/A
1. Test instructions were clear and concise.	1	2	3	4	N/A
2. I was allowed the opportunity to ask questions.	1	2	3	4	N/A
3. The time allowed for testing was indicated prior to the start of the test.	1	2	3	4	N/A
4. The instructor indicated what materials could be used during testing.	1	2	3	4	N/A

DURING THE TEST:	Strongly Disagree	Disagree	Agree	Strongly Agree	N/A
5. Distractions were minimal.	1	2	3	4	N/A
6. I was aware of the time remaining to complete the test.	1	2	3	4	N/A
7. Unfair advantage was not given to any other student during the test.	1	2	3	4	N/A
8. A monitor was present at all times during the test.	1	2	3	4	N/A

**B. INSTRUCTIONS:** If you have taken a written test, please answer questions 9-11. If you have taken a performance test, please answer questions 12-18. If you are unsure of your test type, ask the test proctor.

WRITTEN TEST ONLY:	Strongly Disagree	Disagree	Agree	Strongly Agree	N/A
9. All materials (pen, paper, etc.) necessary for the test were available.	1	2	3	4	N/A
10. Questions were written in a way that I could understand.	1	2	3	4	N/A
11. The information I was tested on was covered in class.	1	2	3	4	N/A

PERFORMANCE TEST ONLY:	Strongly Disagree	Disagree	Agree	Strongly Agree	N/A
12. I had sufficient practice time prior to the test.	1	2	3	4	N/A
13. All equipment necessary for the test was accessible.	1	2	3	4	N/A
14. The skills/information I was tested on were covered sufficiently in class.	1	2	3	4	N/A
15. Performance task requirements were effectively communicated.	1	2	3	4	N/A
16. Safety precautions were reemphasized prior to commencing tasks.	1	2	3	4	N/A
17. Equipment/material was safe for use.	1	2	3	4	N/A
18. Cease Training procedures were adequately explained.	1	2	3	4	N/A

**Circle your answer.**

19. Prior to the test, I studied:	Less Than 1 Hour	1-2 Hours	2-3 Hours	More than 3 Hours	Did Not Study
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Check (X) yes or no. If answer is yes, please indicate subject areas.	YES	NO
20. Was there any portion of the test that you believe should have been covered more thoroughly during class/practical application? If so, please indicate the subject areas.		

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**Other Comments (Please explain any questions rated 1 or 2): (REMARKS ON BACK)**

End of Course Critique

### END OF COURSE CRITIQUE

The End of Course Critique provides the school with your reaction to the course you just completed. The information you provide us is treated confidentially and is used to improve the quality of instruction for the overall course. Thank you for your input.

COURSE:

DATE:

STUDENT NAME:

A. Circle or highlight the rating that indicates your level of agreement or disagreement. Please comment on all ratings of 1 or 2. All comments are encouraged regardless of whether you agreed or disagreed.	Strongly Disagree	Disagree	Neither Disagree or Agree	Agree	Strongly Agree
1. I had a clear understanding of what I would be required to learn or do in this course? (The learning objectives were clearly stated.) <b>COMMENTS:</b>	1	2	3	4	5
2. I am confident that I have learned or can perform the tasks required by the learning objectives? <b>COMMENTS:</b>	1	2	3	4	5
3. The written and performance exams tested my knowledge and/or ability to perform the learning objectives? <b>COMMENTS:</b>	1	2	3	4	5

4. The quizzes/puzzles/games/review sessions, when used, increased my knowledge of the subject and prepared me for the tests.	1 2 3 4 5 N/A
<b>COMMENTS:</b>	
5. Class time was used to achieve the learning objectives.	1 2 3 4 5
<b>COMMENTS:</b>	
6. The time allotted to cover each lesson was appropriate for what I was expected to learn.	1 2 3 4 5
<b>COMMENTS:</b>	
7. Course length was appropriate for what was expected.	1 2 3 4 5
<b>COMMENTS:</b>	
8. The overall schedule for the course flowed logically and was well-organized.	1 2 3 4 5
<b>COMMENTS:</b>	

<p>9. Student outlines, training aids (i.e. internet sites, graphs, charts, maps), and/or references were available.</p> <p><b>COMMENTS:</b></p>	<p>1 2 3 4 5 N/A</p>
<p>10. The student outlines, training aids (i.e. internet sites, graphs, charts, maps), and/or references used supported instruction.</p> <p><b>COMMENTS:</b></p>	<p>1 2 3 4 5 N/A</p>
<p>11. Student outlines aided my understanding of the material.</p> <p><b>COMMENTS:</b></p>	<p>1 2 3 4 5 N/A</p>
<p>12. Student outlines were easy to follow!</p> <p><b>COMMENTS:</b></p>	<p>1 2 3 4 5 N/A</p>
<p>13. The media (i.e. PowerPoint, models, posters) used supported instruction.</p> <p><b>COMMENTS:</b></p>	<p>1 2 3 4 5 N/A</p>
<p>14. Considering the amount of material covered during the course, there was sufficient time available on both in-class and out-of-class (if applicable) work.</p> <p><b>COMMENTS:</b></p>	<p>1 2 3 4 5</p>

<p>15. The methods (i.e. lecture, demonstration, practical application, case study, group exercises) used to present course information helped me to understand the course material.</p>	<p>1 2 3 4 5</p>
<p><b>COMMENTS:</b></p>	
<p>16. Instructors were knowledgeable and well-prepared.</p>	<p>1 2 3 4 5</p>
<p><b>COMMENTS:</b></p>	
<p>17. The instructors responded effectively to questions and input.</p>	<p>1 2 3 4 5 N/A</p>
<p><b>COMMENTS:</b></p>	
<p>18. The instructors were professional.</p>	<p>1 2 3 4 5</p>
<p><b>COMMENTS:</b></p>	
<p>19. The overall course gave me a thorough understanding of my duties in the operating forces and sufficient knowledge and skills to perform those duties.</p>	<p>1 2 3 4 5 N/A</p>
<p><b>COMMENTS:</b></p>	
<p>20. Instructors followed safety precautions at all times.</p>	<p>1 2 3 4 5 N/A</p>
<p><b>COMMENTS:</b></p>	

21. Lessons on safety were included as applicable.	1 2 3 4 5 N/A
<b>COMMENTS:</b>	
22. Lessons related safety to job performance as applicable.	1 2 3 4 5 N/A
<b>COMMENTS:</b>	
23. Cease Training procedures were adequately explained as applicable.	1 2 3 4 5 N/A
<b>COMMENTS:</b>	
24. Emergency action procedures were adequately explained as applicable.	1 2 3 4 5 N/A
<b>COMMENTS:</b>	
25. Safety precautions were put in place prior to each event as applicable.	1 2 3 4 5 N/A
<b>COMMENTS:</b>	

**B. Answer the following questions.**

26. Were there any particular lessons/blocks of instruction that were particularly confusing or could be improved?  
YES/NO -- If you responded yes, please explain.

27. Were there any portions of the course where there was idle time (i.e. standing around, not focused)? YES/NO -- If you responded yes, please explain.

28. What is your overall evaluation of the instructors?

What is your overall evaluation of the course?

After Instruction Report

<b>AFTER INSTRUCTION REPORT</b>						
<b>INSTRUCTOR:</b>			<b>DATE:</b>			
<b>LESSON TITLE:</b>			<b>COURSE NUMBER:</b>			
<b>NUMBER OF IRFs:</b>			<b>NUMBER OF STUDENTS:</b>			
<p><b>INSTRUCTIONS TO INSTRUCTOR:</b> The Instructional Rating Form (IRF) allowed students to use a 1 to 4 rating scale with the level of agreement or disagreement as follows: Strongly Disagree = 1, Disagree = 2, Agree = 3, or Strongly Agree = 4. NA is on the IRF as an option for statements that are not applicable. For the After Instruction Report (AIR), calculate how many student(s) circled "1" and place that number in the blank under "1" beside the corresponding question. Follow the same procedure for the ratings of "2", "3", and "4". The instructor should address all negative responses ("1's" or "2's") under the instructor comments.</p>						
<b>1. INSTRUCTOR: Questions related to the instructor.</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>NA</b>
a. The instructor showed a thorough knowledge of the course material.						
b. The instructor communicated the lesson material in a way that could be easily understood.						
c. The instructor gave precise instructions concerning in-class exercises.						
d. The instructor encouraged student participation.						
e. Student's questions were answered in a professional (not demeaning to the student) manner.						
<b>2. LESSON CONTENT: Questions related to the lesson content.</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>NA</b>
a. The content was presented at the right pace.						
b. The student outline aided my understanding of the content covered.						
c. The environment of the class was interactive.						
<b>3. SAFETY: Questions related to safety.</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>NA</b>
a. Lesson related safety to job performance.						
b. Cease Training procedures were adequately explained.						
c. Safety precautions were reemphasized prior to commencing task.						
d. Safety was paramount at all times.						
e. Equipment/material was safe for use.						
<b>4. METHODS/MEDIA: Questions related to Methods/Media.</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>NA</b>
a. The in-class exercises required in the course were worthwhile learning experiences.						
b. The instructional method(s) used in presenting the class material enhanced my ability to learn/perform the concept/task.						
c. The media complimented instruction.						

<p><b>5. STUDENT:</b> Questions indicating student's perspective of any noted increased in his/her knowledge level. Refer to questions 5a and 5b to answer the questions below. Place number of students who indicate an increase in knowledge level in "a" and number of student indication NO increase in knowledge level in "b".</p>	
<p><b>a. How many students increased their knowledge to "Average", "Above Average", or "Expert"?</b> (For example, if a student answers 5a on IRF as "None" and answers 5b as "Average", then the student perceives an increase in his/her knowledge level).</p>	
<p><b>b. How many students indicated that there was no change in their knowledge level?</b> (For example, if a student answers 5a as "Average" and answers 5b as "Average", then no change has occurred in knowledge level).</p>	
<p><b>Comments (as noted by students from Instructional Rating Forms):</b></p>	
<p><b>Instructor Comments:</b></p>	
<p><b>Reassessment of ORA:</b> (Comment on ORA; recommend additional safety considerations to ORA, provide lessons learned, etc.)</p>	
<p>_____ Instructor Signature / Date</p>	

Course Chief Comments:

EXAMPLE

Course Chief Signature / Date

Post Graduate Survey

**POST GRADUATE SURVEY**

Course: \_\_\_\_\_ (Course Name) CID: \_\_\_\_\_ (Course ID #)

**Instructions:** This questionnaire is designed to gather information to evaluate the effectiveness of the \_\_\_\_\_ Course in preparing you for your current duty assignment. Please respond to all questions and return the completed questionnaire by (email or mail).

**SECTION I: PERSONAL DATA** - Please fill in appropriate data.

Name	Rank	Graduation Month/Year
Billet	MOS	
DSN number for contact	Email	

**SECTION II: TASK TRAINING**

The tasks listed below presently receive some emphasis in the course. Please rate each task/knowledge on the scales at the right in terms of its importance to your current job and the adequacy of training received by **bolding** or **highlighting** the most appropriate number. (Level of Preparedness scale may be skipped if the task has never been performed on the job.)

TASK/KNOWLEDGE	FREQUENCY	LEVEL OF PREPAREDNESS
<b>INSTRUCTIONS: BOLD or Highlight the number that applies.</b>	1- Daily	1- Not at all prepared
	2- Weekly	2- Somewhat prepared
	3- Monthly	3- Prepared
	4- Never	4- Well-prepared
(List tasks required in the course HERE)	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5

(Add additional pages if needed)

Post Graduate Supervisor Survey

**POST GRADUATE SUPERVISOR SURVEY**

Course: \_\_\_\_\_ (Course Name) CID: \_\_\_\_\_ (Course ID #)

Instructions: This questionnaire is designed to gather information to evaluate the effectiveness of the \_\_\_\_\_ (Course Name) Course in preparing graduates for future duty assignments. Please respond to all questions and return the completed questionnaire by (email or mail).

**SECTION I: PERSONAL DATA** - Please fill in appropriate data.

Graduate's Name	Rank	Graduation Month/Year		
Graduate's Billet	Type of Unit	MOS		
DSN number for contact	Email			
How long have you served in your current billet? ( <b>Bold</b> or highlight one)	0-6 mths	7-12 mths	13-18 mths	Over 18 mths

**SECTION II: TASK TRAINING**

The tasks listed below presently receive some emphasis in the course. Please rate each task/knowledge on the scales at the right in terms of its importance to the graduate's current job and the adequacy of training received by **Bolding** or highlighting the most appropriate number. (Level of Preparedness scale may be skipped if the task has never been performed on the job.)

TASK/KNOWLEDGE	FREQUENCY	LEVEL OF PREPAREDNESS
<b>INSTRUCTIONS: Bold or Highlight the number that applies.</b>	1- Daily	1- Not at all prepared
	2- Weekly	2- Somewhat prepared
	3- Monthly	3- Prepared
	4- Never	4- Well-prepared
		5- Very well prepared
(List tasks required in the course HERE)	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5
	1 2 3 4	1 2 3 4 5

(Additional pages/sections may be added to provide specific information for the school, i.e. type o equipment being used in the FMF, procedures being followed in the FMF)

**SECTION III: COMMENTS AND RECOMMENDATIONS**

This section allows the supervisor to provide additional information and comments regarding the effectiveness of the course in preparing the graduate for their current job. Please record your response in the spaces provided. (Attach additional sheets if more space is required.)

1. What recommendations do you have for training tasks you feel were not covered adequately in the course?

2. If you feel some tasks listed need not be trained in the formal school, please list them here and explain your reasons.

3. Do you believe the graduate benefited from this course? If so, how? If not, why not?

4. How can we improve this course for future students? (Consider present/future procedure and equipment changes.)

**Additional Comments:**

Safety Questionnaire

**SAFETY QUESTIONNAIRE**

**INSTRUCTIONS:** This checklist is to ensure that you, the student, have been properly advised of safety issues specific to this training. Your comments will help this school provide safe training, improved guidance to the instructional staff, and to address your concerns regarding safety measures.

**LESSON TILE/PRACTICAL APPLICATION:**

**INSTRUCTOR:**

**DATE:**

<b>A. Check the appropriate answer.</b>	<b>YES</b>	<b>NO</b>			
2. Did instructors follow safety precautions at all times?					
3. Were safety precautions explained prior to training?					
4. Were safety precautions reemphasized prior to practical applications and/or performance exam?					
5. Were Cease Training procedures adequately explained?					
6. Did the instructor explain the procedure to be taken in the event of a mishap?					
7. Was a safety brief included as applicable?					
8. Did the lesson relate safety to job performance?					
9. Were the tools and equipment in good working condition and safe to use?					
10. Was supervision available when performing potentially dangerous tasks?					
11. Was there encouragement to report any unsafe or unhealthy conditions?					
<b>B. Circle the rating that indicates your level of agreement or disagreement.</b>	<b>Strongly Disagree</b>	<b>Disagree</b>	<b>Strongly Agree</b>	<b>Agree</b>	<b>N/A</b>
1. I felt my safety was always a primary concern of the instructor.	1	2	3	4	N/A
2. I felt that the training environment was both safe and non-hazardous.	1	2	3	4	N/A

**Additional Comments (Write number of reference and then comment):**

**STUDENT NAME:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

## School Standard Operating Procedure Checklist

**SCHOOL SOP CHECKLIST****12. Determine Contents****a. Usability Information**

- |  |  |
|--|--|
| <input type="checkbox"/> Purpose         | <input type="checkbox"/> Locator Sheet     |
| <input type="checkbox"/> Scope           | <input type="checkbox"/> Record of Changes |
| <input type="checkbox"/> Background      | <input type="checkbox"/> Table of Contents |
| <input type="checkbox"/> Recommendations | <input type="checkbox"/> Appendices        |
| <input type="checkbox"/> Certification   | <input type="checkbox"/> Index             |
| <input type="checkbox"/> Distribution    |  |

**b. Non-Academic Information**

- Mission
- Organization
- Operations & General Information
- Facilities
- Billeting
- Messing
- Discipline
- Staff Development
- Turnover Files
- Transportation
- Safety/Operational Risk Management
- Administration and Logistics
- Field Exercises
- Inspections
- Daily Routine
- Physical Fitness

**c. Academic Information**

- Job Analysis
- Design
- Development
- Methods and Media Selection
- Scheduling
- Master Lesson File
- Formats
- Validation
- Implementation
- Evaluation
- Course Content Review Board (CCRB)
- Mastery
- Graduation Requirements
- Remediation
- Programs of Instruction (POI)
- Course Description Data (CDD)
- Homework

## Sample Evaluation Plan /Graduate Job Performance

**SAMPLE EVALUATION PLAN / GRADUATE JOB PERFORMANCE**

1. Purpose and Data Required. The purpose of this evaluation is to determine the effectiveness of the XYZ Course in adequately preparing graduates to perform the duties of MOS XXXX. The following data will be required to determine the effectiveness of the course.

- a. Individual Training Standards (ITS) for MOS XXXX.
- b. On-the-job performance data for graduates of Class XX-X from graduates and graduates' supervisors.
- c. Applicable technical and doctrinal references.

2. Sources of Data

- a. XYZ course materials [lesson plans, student materials, supplemental student materials, media, tests, Program of Instruction (POI), Record of Proceedings (ROP)]
- b. Graduates of Class XX-X (30 students).
- c. Supervisors of graduates from Class XX-X.

3. Schedule

a. Class XX-X will graduate on 30 July 2009. To ensure valid data can be collected, the evaluation is scheduled for 30 August allowing graduates to have been on the job at least 30 days. The principal evaluator has determined that it will require 30 days to complete an evaluation of the XYZ Course. The evaluation is scheduled to be completed 1 October 2009. However, any unforeseen delays or changes to the schedule will affect the completion date.

b. One principal evaluator and one part-time evaluator will be required to properly collect, analyze, and interpret data and report the results. The time and resources required are based on the following evaluation activities.

- (1) Collect and review course materials in preparation for survey design - 1 day
- (2) Design and validate survey questionnaires - 4 days
- (3) Conduct survey (mail/email questionnaires; receive/monitor responses; follow-up) - 20 days
- (4) Train part-time evaluator in data analysis and interpretation - 1 day
- (5) Data analysis and interpretation - 3 days
- (6) Prepare report of findings and recommendations - 1 day

4. Data Collection Methods

a. XYZ Course materials will be reviewed to gather data to develop relevant survey questions.

b. Survey questionnaires will be used to collect graduate job performance data. The survey questionnaires will be designed using a Likert rating scale to allow quantification and analysis of the data. A small number of questionnaire items will be designed for open-ended responses to solicit recommendations and other comments. The survey will be validated using SME's assigned to the school.

c. Because of time and resource constraints, this evaluation will be conducted by personnel assigned to the XYZ school. One evaluator will be assigned as the principal evaluator during data analysis and interpretation. The part-time evaluator will be trained to format and code data to assist in performing the data analysis. A copy of the survey questionnaire containing hypothetical data will be used as a training aid.

5. Method for Data Analysis and Interpretation: The following analyses will be conducted using data from the returned questionnaires.

a. For all responses concerning how well the course prepared students for subsequent job duties:

(1) Descriptive statistics for graduate and supervisor responses.

(2) Comparison between graduate and supervisor ratings of course effectiveness.

b. Descriptive statistics for graduate and supervisor responses concerning the importance of each ITE trained and how well each ITE was trained.

c. The qualitative data collected by open-ended responses will be categorized and analyzed to identify trends that may affect the structure of the course.

d. The results of these analyses will be interpreted to determine the extent to which training prepared graduates to perform the duties of MOS XXXX and the importance of each task trained.

6. Method for Reporting. A preliminary report of evaluation results will be presented and reviewed at the CCRB, scheduled for 20 October 2009. Based on this meeting, a ROP will be prepared documenting evaluation results and any recommended revisions to the course.

### SAMPLING TABLE

Population	95% Confidence	90% Confidence	80% Confidence
10	10	10	9
20	19	19	18
40	36	35	32
60	52	49	44
80	67	62	54
100	80	73	62
120	92	83	69
160	114	101	81
200	133	115	90
250	154	130	99
300	171	142	106
350	187	153	112
400	200	161	116
450	212	169	120
500	222	176	123
600	240	186	129
700	255	195	133
800	267	202	136
900	277	208	139
1,000	286	213	141
1,500	316	229	148
2,000	333	238	151
2,500	345	244	154
3,000	353	248	155
3,500	358	251	157
4,000	364	253	157
4,500	367	255	158
5,000	370	257	159
10,000	383	263	161
25,000	394	268	163
100,000	398	270	164

#### HOW TO USE THIS TABLE

**Example:** For a population of 4,200 course graduates, an estimated (desired) return rate of 85%, and a confidence level of 95%, sample size would be determined using the following procedure:

1. Locate the number corresponding to the population size. Since 4,200 is not provided in the table, round the number up or down to the nearest value. For example, the population value of 4,200 would be rounded down to 4,000.
2. Locate the value corresponding to the 95% confidence level with a population size of 4,000. Using the table above, this value is 364 (meaning that 364 questionnaires are required). This figure should be 85% of the questionnaires mailed out.
3. To determine the number of questionnaires that need to be mailed out to obtain 364 usable questionnaires, substitute the values in the formula provided below. Using our example, for a population of 4,200 and an expected return rate of 85%, the desired sample size would be 364. Therefore, in order to obtain an 85% response rate (364 responses), 428 questionnaires need to be mailed out.

The table can be used as shown in the following example:

For a population of 4,000, 95% confidence level desired, and estimated return (response) rate of 85%:

$$\frac{364 \times 100}{85} = 428$$

Training Command Unfunded Training Requirement Request Form

1. Requesting Unit/Section: \_\_\_\_\_ 2. FY: \_\_\_\_\_

3. POC, Phone & E-mail: \_\_\_\_\_

4. Appropriation: \_\_\_\_\_ (O&M, MC; PMC)

5. AGSAG: \_\_\_\_\_

AGSAG: 3A2C Officer Acquisition 3B1D Specialized Skills Training 3B2D Flight Training 3B4D Training Support BSS1 Base Ops
--

6. Requirement Type: \_\_\_\_\_ POM/PR, OEF/OIF/OCO, Emergent Training Requirement, Bridge Funding

7. CID/POI: \_\_\_\_\_

(CID/POI Date/Status)  
(HHQ Staffing Comment)  
(Overhead Cost ISO CIDs/POIs)

8. Title of Requirement: \_\_\_\_\_

9. Importance:

Critical:	Critical to the unit's ability to operate
Important:	Unit/section severely degraded in ability perform mission without
Enhancing:	Good to do, will improve unit/section's existing capabilities

10. Priority: \_\_\_\_\_ of \_\_\_\_\_

11. Description of Requirement and reason for request:

Ensure DETAILED descriptions are provided by the requestors to preclude follow-on questions, i.e. provide all who, what, when, where, why and how of each request. Include unit price, quantity, etc., as applicable. Also describe the requirement that drives the funding request, i.e. specific TRNGCMD directive, T/E shortfall, UUNS, safety requirement, approved POI. Additionally, outline the operational impact (improvement) if the funding request is supported. If you are already providing this service then a detailed description/justification is required to support additional funds, i.e; "we stopped doing X in order to execute Z, but now we have to do X as well as the new requirement".

12. Impact If Not Funded:

Use performance metrics as applicable. Impact statements should leave no doubt to the reader as to mitigating actions commanders/section heads are prepared to execute should additional funding not be provided.

13. Status: Describe if this is a recurring validated unfunded requirement i.e. was this and how many times has this deficiency been submitted in the POM/PR, OIF/OEF Supplemental/MYR/EOY and where has the HHQ prioritized it.

14. New Contract(s) Establishment Required: No/Yes, if Yes can it be executed within the FY.

**15. FYXX Supplemental Requirement Allocation/Obligation Phasing Plan (\$000)**

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
Allocation Plan													
Obligation Plan													

Allocation: When funding is needed in order to Commit the funds.

Obligation: When funding will be obligated in the Official Accounting System (SABRS).

**16. FYXX Supplemental Requirement (\$000)**

Category	Amount (\$000)
Civilian Pay (Civil Svc)	
WWTAD	
TAD	
SME TAD	
Supplies (Incl. Fuel)	
Equipment	
Printing/Repro	
Maintenance	
Postal	
Service Contracts	
Other (Specify)	
MIPRs/WRs (Specify purpose)	

**16a. Quantity of items requested:**

**16b. TAMCN (TAM Control #):**

**16c. Civilian Labor Breakout:**  
Provide GS or YA rating of any new hire that supports the Initiative.

Notes: Itemized Listing: Include unit price, quantity, etc., as applicable. Identify the number of contractor support (if required), type of contractor, number of hours and hourly rate or yearly rate of contract. Include Other Direct Cost of the contract (i.e., TAD, NMCI seats, overhead, etc)

Examples:

<u>ITEM</u>	<u>QUANTITY</u>	<u>UNIT/COST</u>	<u>TOTAL COST</u>
MTSS Contract Support	120 personnel	approx 200,000/per	24M (example only)
Manikins	5	1,000 per	5000 (example only)

**17. Recurring Outyear Costs (As Applicable \$000)**

Appn	FY10	FY11	FY12	FY13	FY14	FY15	TOTAL

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## ACRONYMS

AIMMS - Administration Instruction Manpower Management System

AIR - After Instruction Report

AFTMS - Air Force Training Management System

AOWP - Automated Orders Writing Process

ATRRS - Army Training Requirements and Reserve System

BNA - By Name Assignment

BTR - Basic Training Record

CBT - Computer Based Training

CCRB - Course Content Review Board

CDD - Course Descriptive Data

CDI - Compact Disc Interactive

CID - Course Identifier

CMC - Computer Mediated Conferencing

CT - Cease Training

CTC - Cease Training Criteria

CTE - Collective Training Event

DOD - Department of Defense

DODIC - Department of Defense Identification Code

DVC - Desktop Video Conferencing

EDCOM - Education Command

ECC - End of Course Critique

ELO - Enabling Learning Objective

ERF - Examination Rating Form

FEA - Front-End Analysis

FLC - Formal Learning Center

FLCER - Formal Learning Center Evaluation Report

FMF - Fleet Marine Force

GAR - Grade Adjusted Recapitulation  
HRT - High Risk Training  
  
ICM - Interactive Courseware Multimedia  
  
IRF - Instructional Rating Form  
  
ISD - Instructional System Development  
  
IT - Interactive Televisions  
  
ITRR - Institutional Training Readiness Report  
  
ISC - Information Systems Coordinator  
  
ITE - Individual Training Event  
  
ITRO - Inter-service Training Review Organization  
  
IVD - Interactive Video Disc  
  
JTO - Joint Training Objective.  
  
KSA - Knowledge, Skills, and Attitudes  
  
LAW - Learning Analysis Worksheet  
  
LOW - Learning Objective Worksheet  
  
MCTIMS - Marine Corps Training Information Management System  
  
MCCDC - Marine Corps Combat Development Command  
  
MCTFS - Marine Corps Total Forces System  
  
MILMOD/OTA - Air Force Military Modernization Program/Oracle Training Administration  
  
MLF - Master Lesson File  
  
MMTR - Military Manpower Training Report  
  
MOS - Military Occupation Specialty  
  
MPP - Manpower Plans and Policies  
  
NITRAS - Navy Integrated Training Administrative System  
  
ORM - Operational Risk Management  
  
ORAW - Operational Risk Assessment Worksheet  
  
POI - Program of Instruction  
  
POM - Program Objective Memorandum  
PPBE - Planning, Programming, Budget and Execution

RAPELLA - Reserve Affairs Personnel Entry-level Assignment System  
RDM - Recruit Distribution Model

ROP - Record of Proceedings

SAT - Systems Approach to Training

SMART - Sailor Marine Academic Record Transcript

SME - Subject Matter Expert

SOP - Standing Operating Procedures

SSC - Service School Code

TRNGCMD - Training Command

TECOM - Training and Education Command

TIP - Training Input Plan

TLO - Terminal Learning Objective

TPD - Target Population Description

TQM - Training Quota Memorandum

T&R - Training and Readiness

TRRMS - Training Requirement Resource Management System

UD/MIPS - Unit Diary/Marine Integrated Personnel System

VC - Virtual Conferencing

VR - Virtual Reality

VTC - Video Teleconference

VTT - Video Teletraining

WWT - World Wide Travel

## GLOSSARY

**Academic Time.** Academic time includes curriculum hours dedicated to lecture, practical application, performance examination, written examination, review, and tutoring within the Program of Instruction (POI).

**Actual Item/Object.** Equipment or devices that are actually utilized in the performance of the task or job.

**Administrative Time.** Administrative time consists of curricula hours committed to in and out processing times, commanding officer's time, graduation, physical training (when it does not have TLOs or ELOs associated with it and does not affect the student's GPA), inspections, and field days in a Program of Instruction (POI).

**Affective Domain.** A taxonomy for classifying objectives that deals with feelings, attitudes, values, and other indicators of emotionally-based behavior.

**After Instruction Report (AIR).** An evaluation tool that summarizes one-iteration of a lesson by documenting the student's assessment of a lesson, the instructor's assessment of a lesson (Instructional Rating Form) and exam (Examination Rating Form), test results related to the instruction, and any end of course critique data related to the specific lesson.

**Aiding Conditions.** Any information or resource that is available to the student and identified in the learning objective.

**Analysis.** Level of cognitive domain (Bloom, 1956) in which students are able to break down complex organizational structures into their component parts.

**Analyze Phase.** Initial phase of the Systems Approach to Training (SAT) process. The purpose of the analyze phase is to determine what the job holder must know or do on the job.

**Andragogy.** Literally means the art and science of teaching adults.

**Application.** Level of cognitive domain (Bloom, 1956) in which students are able to use learned material in new and concrete situations.

**Attitudes.** An acquired mental state that influences choices for personal action, such as preferences, avoidance, or commitment.

**Audiotapes.** Magnetic media that presents and uses audio to strengthen the learning of languages or other materials that require verbal repetition.

**Auditory Learners.** Learners who tend to learn better by hearing.

**Background Knowledge.** The knowledge a student already knows prior to the start of instruction. Research suggests that, outside of socio-economic factors, the best predictor of student learning is what the student's background knowledge is. Transference of knowledge from one domain to another is likely to be more successful if connections can be made between what we want the student to know and what the student already knows.

**Basic Fundamental Movement.** Level of psychomotor domain (Simpson, Harrow, & Simpson) in which students can perform inherent movement patterns by combining reflex movements which are the basis for complex skilled movements.

**Behavior.** Any activity, overt or covert, capable of being measured. Also, any activity the student is expected to exhibit after instruction and the primary component of a learning objective.

**Body.** Major section of a lesson in which learning is developed through support material and various teaching exercises to achieve instructional objectives; preceded by an introduction and followed by a conclusion.

**Break Cues.** Reminds the Instructor when to provide students with a break.

**Briefing.** A briefing is a formal or informal presentation in which a variety of significant facts is presented as concisely as possible. The briefing is rarely concerned with material beyond the knowledge level and is almost always accompanied by visual representation of the material in the form of charts, graphs, slides, and other aids. Strictly speaking, the briefing is not a teaching method, but it is sometimes used in school situations.

**Case Study.** The case study is a learning experience in which students encounter a real-life situation in order to achieve some educational objective. By studying realistic cases in the classroom, students develop new insights into the solution of specific on-the-job problems and also acquire knowledge of the latest concepts and principles used in problem solving.

**Cease Training (CT).** An agreed upon verbal and/or non-verbal signal used to temporarily cease all training when, in the opinion of the signaler, a serious hazard exists or an individual is experiencing serious problems.

**Cease Training Criteria (CTC).** Conditions or hazards, when present, require Cease Training (CT).

**Central Tendency.** A single number that best represents a distribution of a set of numbers. The three most common measures of central tendency are the mode, median, mean.

**Characterization.** Highest level of affective domain (Krathwohl, 1956) in which students integrate values or value systems into their own life style or philosophy of life.

**Checklists.** Checklist consists of carefully worded questions that the evaluator answers by his review of course materials or observation of course components (e.g., graduate or instructor performance, conduct of a class).

**Clarifying Questions.** Follow-up questions to confirm a respondent's answer or to clarify what the respondent has said.

**Closed-ended Question.** A question that limits respondents' answers to predetermined response categories. Multiple choice and yes/no questions are examples of closed-ended questions.

**Closure.** The final segment of a lesson during which instruction is appropriately ended by reemphasizing how the lesson presented will be meaningful to the student.

**Coaching.** An intensive learning experience for individual or for small groups, characterized by significant student involvement and immediate instructor feedback. A video recording of student performance is an excellent teaching aid when supplemented by an instructor's analysis and critique. This technique is particularly effective in instructor training.

**Coding.** Coding data is the process of organizing data into sets of categories to capture the meaning or main themes in the data. Coding is usually done in the analysis of qualitative data, but quantitative data can also be grouped into code categories.

**Cognitive Domain.** A taxonomy for classifying objectives that deal with verbal knowledge and intellectual skills such as concept learning and procedural skills.

**Collaborative Learning or Cooperative Learning.** An instructional approach in which students of varying abilities and interests work together in small groups to solve a problem, complete a project, or achieve a common goal.

**Collective Training Event (CTE).** A collective event is a clearly defined, discrete, and measurable activity, action, or event (i.e., task) that requires organized team or unit performance and leads to accomplishment of a mission or function.

**Collective Training Standards (CTS).** Criteria that specify mission and functional area unit proficiency standards for combat, combat support, and combat service support units. They include tasks, conditions, standards, evaluator instruction, and key indicators. CTS are found within collective training events in the T&R manuals.

**Compact Disc Interactive (CDI).** It is an interactive multimedia system combining moving and still video, audio and program content on a compact disc, which can be played back in a dedicated CD-player. It operates on its own and it can be connected to a standard TV-set for displaying pictures and sound, and optionally to a stereo-system.

**Comprehension.** Level of cognitive domain (Bloom, 1956) in which students begin to develop understanding and are able to translate, interpret, and extrapolate subject matter under study.

**Computer-Assisted Instruction.** The use of computers to aid in the delivery of instruction. A variety of interactive instructional modes are used including tutorial, drill and practice, gaming, simulation, or combinations.

**Computer-Based Training (CBT).** An instructional methodology where students interact individually, presented through a variety of media, controlled and monitored by a computer.

**Computer Mediated Conferencing (CMC).** Conferencing using the personal computer and telephone line as the communication vehicles. It provides Instruction-Student and Student-Student interaction in both an asynchronous and synchronous mode.

**Concept.** A class of people, objects, events, ideas, or actions which are grouped together on the basis of shared critical attributes or characteristics, and are called the same name.

**Concept Card.** Provides formal schools/training units with a snapshot of individual lessons.

**Concurrent Validity.** The validity between a new exam and a previously recognized exam already accepted as valid.

**Condition.** That portion of the learning objective that describes the situation/environment in which the students perform the specified behavior. Conditions include any pertinent influence upon task performance, including any or all of the following: location of performance, environment, equipment, manuals, or supervision required.

**Cone of Learning.** The Cone of Learning shows the progression from reading to doing and how it correlates to what is remembered over time.

**Conflicting Relationships.** Conflicting relationships exist between learning objectives that involve opposite responses to the same cue in a different context.

**Consistency.** Describes the results of a reliable evaluation instrument which remain similar given similar testing conditions (similar students, knowledge base, physical testing situation, etc.) over a period of several uses.

**Construct.** Exists only in the mind. Examples are love and hate.

**Content Validity.** A test with high content validity measures the material being covered in the curriculum or unit being tested as defined in our objective(s). In other words the test questions should refer to the subject matter covered.

**Course Content Review Board (CCRB).** A formal review of course materials to determine the validity of course topics and make recommendations for changes, revisions, or deletions of the content a course to TECOM (C 469).

**Course Descriptive Data (CDD).** A report, which documents course description, resource requirements, and justification for the development or refinement of formal programs of instruction (POI), taught at Marine Corps training and education institutions.

**Courseware.** Paper-based, audiovisual, and electronically stored instructional material necessary to deliver a lesson, instructional module, or course.

**Creativity.** The imaginative recombination of known elements into something new and useful.

**Criterion-Related Validity.** Any test of carefully written measurable objectives to obtain data to compare student performance levels with that specified in the objectives.

**Criterion-Referenced Assessment.** An assessment that measures what a student understands, knows, or can accomplish in relation to specific performance

objectives. It is used to identify a student's specific strengths and weaknesses in relation to skills defined as the goals of the instruction but it does not compare students to other students. (Compare to norm-referenced assessment.)

Cues. Markings that are graphically placed in the body of the lesson to assist the instructor in the presentation of instruction

Curriculum. All instruction conducted within a school, outlined into specific topics, along with detailed learning objectives, to include behavior, conditions, and standards.

Curriculum Validation Team. A method of validation in which an experienced jobholder, novice, supervisor, instructor, and instructional designer meet to review the instructional material.

Delivery System. The instructional method and media used to present the instruction.

Demonstration. A teaching method in which students observe and then practice a sequence of events designed to teach a procedure, a technique, or an operation. It combines oral explanation with the operation or handling of systems, equipment, or materials.

Dependent Relationships. Dependent relationships exist between learning objectives that are prerequisite to other learning objectives.

Design Phase. The second phase of the Systems Approach to Training (SAT) process, which defines the course learning objectives, test, and delivery system, and from which instruction is developed.

Diagnostic Test. The purpose of a diagnostic test is to measure the achievement of the supporting skills and knowledge that contribute to the ability to perform the criterion objective.

Dialogue. Interaction between two or more persons, one of whom may be the instructor, generally to present sharply opposing points of view for students. The dialogue is often highly structured towards preplanned goals and may take the form of questions and answers between the participants.

Dichotomous Variable. A variable with only two possible responses.

Differentiation. A characteristic of evaluation which requires that tests and rating instruments be capable of making distinctions between selected groups; usually masters or non-masters of specific instructional objectives in criterion-referenced testing or high and low overall test performers in norm-referenced testing.

Directed Discussion. Involves initiating discussion and channeling students' thinking and responses along predetermined lines.

Direct Question. A question directed at an individual or group with a specific answer.

**Discussion Non-Directed Method.** A group interactive process in which task or objective-related information and experiences are evoked from the student. The instructor normally plays a very limited or passive role.

**Distracters.** Incorrect alternative responses to questions. Distracters should be worded so they are believable, but clear enough so the student is never presented with a choice between several correct answers.

**Distributed Practice Session.** Based on time constraints of the course, the instructional developer divides practice periods into segments. This permits more efficient learning of the psychomotor skills.

**Domains of Learning.** A broad classification of learning types. The three widely accepted domains that are used in this manual are the cognitive (thinking, understanding), affective (attitudes, values), and psychomotor (physical skills).

**Dress Rehearsals.** A process in which an instructor delivers a lesson plan in its entirety to a group prior to the actual class.

**Duty.** A duty (primary skill) consists of one or more tasks performed in one functional area. A duty is the major subdivision of the work performed by one individual. It is recognized as being one of the position incumbent's principal responsibilities. A set of operationally related tasks within a given job.

**Enabling Learning Objective (ELO).** A subordinate learning objective which describes the behavior for prerequisite knowledge and skills necessary for a student to perform a TLO or steps of the ITE.

**End of Course Critique.** Evaluation instrument completed by the student after a course so that the student can assess the overall course.

**Environment.** The physical conditions and surroundings in which a job is performed, or in which learning takes place, including tools, equipment, and job aids.

**Environment Checklist.** Evaluation instrument used to assess physical conditions and training conditions.

**Environmental Conditions.** A Physical or social condition, in which the behavior of a learning objective must be performed.

**Evaluate Phase.** The fifth phase of the SAT process during which the formal school/detachment determines value, worth, or merit of the instructional program.

**Examination Rating Form (ERF).** A reaction form completed by students upon completion of examination.

**External Evaluator.** In either formative or summative evaluations, external evaluators, individuals not responsible for the instructional program, conduct the evaluations. External evaluators normally include Mobile Training Teams (MTTs) from higher headquarters, site visit teams from other schools.

**Extrapolation.** A type of learning at the comprehension level (Bloom, 1956) in which students develop sufficient understanding to estimate trends or predict outcomes regarding the subject matter under study.

**Field Trips.** A field trip is an out-of-classroom experience where students interact with persons, locations, and materials or equipment for the attainment of instructional objectives. An important aspect of the field trip is the student's encounter with real settings.

**Formal Lecture.** A structured and often rehearsed teaching lecture with no verbal participation by students.

**Formal Training.** Training (including specialized training) in an officially designated course conducted or administered in accordance with appropriate course outline and training objectives.

**Formative Evaluation.** Form of evaluation designed to collect data and information that is used to improve the activities and products of the ISD/SAT process while the system is still being developed.

**Free Discussion.** Akin to the "bull session" or the "war story" hour, free discussion can be a valuable adjunct to participatory management or brainstorming but, by its very nature, it seldom supports measurable objectives.

**Front-End Analysis (FEA).** A systematic process in which: (1) A job is analyzed to determine its component tasks and the knowledge and skills necessary to perform these tasks; (2) tasks are selected from training based on the determination of which knowledge and skills are not already in the students' repertoire; and (3) job related performance criteria are developed to measure trainees' ability to satisfy job requirements.

**Gain Attention.** An approach that stimulates student curiosity and describes the benefits students will obtain by paying attention to the instruction.

**Guest Lecture.** A guest lecture is a presentation by a person other than the instructor who is usually an expert. It is used to give variety to the class period or to supply information in an area where the instructor is not an expert.

**Guided Discussion.** An instructional method in which the students participate in an instructor-controlled, interactive process of sharing information and experiences related to the achievement of one or more learning objectives.

**Hazard.** A condition with the potential to cause personal injury or death, property damage or mission degradation.

**Hierarchy.** The characteristic of a domain of learning that rank orders the levels-of-learning of which it is composed. See *Taxonomy of Educational Objectives and Domain of Learning*.

**Higher Levels of Learning.** Those levels of learning above the comprehension level (Bloom, 1956) which may be considered as the practical application of concepts and principles to complex, real problems.

High Risk Training. Basic or advanced individual or collective training, essential for preparing Marines and units for combat, that exposes students and instructors to the risk of death or permanent disability despite the presence and adherence to proper safety controls.

Implement Phase. The fourth phase of the SAT process during which instruction is delivered to the students.

Independent Relationships. Skills and knowledge in one learning objective are unrelated to those skills and knowledge in another learning objective.

Indirect Discourse. Indirect discourse involves verbal interaction among two or more persons, which is seen and heard by students. Some examples include: dialogue, teaching interview, panel, skits, playlets, and other dramatizations.

Individual Rehearsals. A process in which an instructor practices a lesson plan without any assistance from other instructors.

Individual Training Event (ITE). The standards used to specify individual training proficiency requirements (tasks) that support unit mission performance. They include a task (behavior), condition, proficiency standards (often performance steps), and references. ITEs are generally derived from collective training standards. ITEs constitute the basis for design, development, implementation, and evaluation of all individual training conducted in units and institutions.

Informal Lecture. A conversational teaching lecture with considerable verbal interaction between instructor and students employing questions and discussion.

Instruction. The delivery of information to enable learning. The process by which knowledge and skills are transferred to students. Instruction applies to both training and education.

Instructional Aids. Materials used to teach where ownership belongs to the instructor. The students do not get to take the materials with them.

Instructional Design. An area of theory and practice that forms a knowledge base in the field of instructional technology. Processes for specifying conditions for learning.

Instructional Environment. Instructional environment refers to the instructional setting, media/equipment, support personnel, student materials, and the administrative functions the instructor must perform.

Instructional Material. All items of material prepared, procured, and used in a course or programs as part of the teaching or general learning process.

Instructional Method. The means used to present information to the student.

Instructional Rating Form (IRF). A reaction form (questionnaire) submitted to students following completion of a period of instruction that provides feedback on instructor performance, course materials, and instructional environment.

Instructional Setting. The location and physical characteristics of the area in which instruction takes place.

Instructional System Development (ISD). Identical to definition for "systems approach to training."

Instructor. The individual, military and/or civilian, assigned the responsibility of providing instruction.

Instructor Notes. Includes any information pertinent to the conduct of the lesson and can appear throughout the lesson plan.

Instructor Preparation Guide. A checklist that includes essential data, the instructor can quickly look at when preparing the lesson to get an idea of lesson content, duration, method, location, instructors required, references, and necessary instructional aids/equipment.

Interactive Courseware Multimedia (ICM). A set of commercially produced, computer-based, multimedia instructional modules, which comprise a full credit-bearing course. This courseware contains text, computer graphics, photographic stills, animation, sound and motion video. It offers highly interactive learning functionality for the learner, and contains instructional support and student support systems. The courseware is integrated into the delivery of courseware by the faculty. It is not intended for use as a "bolt on" attachment to a traditional lecture based course.

Interactive Multimedia Instruction (IMI). A group of predominantly interactive, electronically delivered training and education support products. IMI products include instructional software and software management tools used in support of instructional programs.

Interactive Television. Literally it combines traditional TV watching with the interactivity of the Internet and personal computer. Programming can include richer graphics, links to Web sites through TV Crossover Links, electronic mail, and chatroom activity and online commerce through a back channel (T-commerce).

Interactive Video Disc (IVD). Computer-controlled laser disc player used to present segments of video in a course or lesson.

Internal Evaluator. In either formative or summative evaluations, individuals working within the organization responsible for the instructional program, conduct the evaluation.

Interpretation. A type of learning at the comprehension level (Bloom, 1956) in which students develop and understand relationships among the various aspects of a communication and are able to perform such activities as making inferences, generalizing, and summarizing.

Interval Scale. Consists of mutually exclusive, exhaustive categories arranged in a hierarchical order. The intervals between numbers that represent categories are equal, but there is no true zero on the scale.

Interview. A set of structured questions used to gather information from respondents. Conducted in person or over the telephone.

**Item Analysis.** A set of methods used to evaluate the effectiveness of test items.

**Item Difficulty.** The number of people who get a particular test item correct, generally expressed in a percentage.

**Item Discrimination.** A comparison between people who have done well on a test and people who have not done well.

**Introduction.** Major section of a lesson designed to establish a common ground between the instructor and students, to capture and hold attention, to outline the lesson and relate it to the overall course, to point out benefits to the students, and to lead the students into the body of the lesson; usually contains gain attention, motivation, and overview steps.

**Job.** The duties, tasks, and task elements performed by one individual that constitutes his/her job. The job is the basic unit used in carrying out the personnel actions of selection, training, classification, and assignment.

**Job Aid.** Any item developed or procured for the purpose of assisting in the conduct of instruction and the process of learning. Examples of job aids include checklists, procedural guides, worksheets, etc.

**Job Performance Measure.** An instrument used to evaluate proficiency of a job holder on each task performed.

**Job Task Analysis.** A process of examining a specific job to identify all the duties and tasks that are performed by the job incumbent at a given skill level.

**Kinesthetic.** The ability to learn by through the use of motion, movement, or the performance of the required activity. Related to task requirements, one of the criteria for selection of delivery systems.

**Kinesthetic Learner.** Learners who tend to learn better by doing.

**Knowledge.** Information required to develop the skills for effective accomplishment of the jobs, duties, and tasks.

**Knowledge-Based Tests.** A knowledge-based test measures cognitive skills.

**Knowledge level.** The lowest level of the cognitive domain (Bloom, 1956) in which students have the ability to recall or recognize material in essentially the same form as it was taught.

**Learning.** A change in a person's behavior as a result of stimulus or experience. The behavior can be physical and overt, or it can be intellectual or attitudinal.

**Learning Analysis.** A procedure to identify a task's related knowledge and skills that must be learned before a student can achieve mastery of the task itself.

**Learning Analysis Worksheet (LAW).** Worksheet used during the learning analysis to generate knowledge and skills related to the task and its performance step(s).

**Learning Objective.** A statement of the behavior or performance expected of a student as a result of a learning experience, expressed in terms of the behavior, the conditions under which it is to be exhibited, and the standards to which it will be performed or demonstrated.

**Learning Objective Worksheet (LOW).** Worksheet used to generate learning objectives, test items, and the delivery system to be used.

**Learning Style.** An individual's preferred ways of gathering, interpreting, organizing, and thinking about information.

**Lesson Plan.** An approved plan for instruction that provides specific definition and direction to the instructor on learning objectives, equipment, instructional media material requirements, and conduct of the training. Lesson plans are the principal component of curriculum materials in that they sequence the presentation of learning experiences and program the use of supporting instructional material.

**Lecture.** A formal or informal presentation of information, concepts, or principles by a single individual.

**Likert Rating Scale.** A rating system that allows data to be evaluated on a quantitative scale.

**Limiting Conditions.** Any information or resource that is not available to the student and identified in the learning objective.

**Main Points.** The primary, logical break out of subject matter to support an instructional objective.

**Managed On-The-Job Training (MOJT).** Training conducted in the unit environment which utilizes a combination of classroom instruction and practical application. The classroom instructor is also the work supervisor of the trainee. Evaluation of the students is based upon the capability to demonstrate specific training standards.

**Management-Oriented Evaluation.** Approach to evaluation that entails collecting information to aid management decision-making as an instructional program operates, grows or changes.

**Massed Practice Session.** The instructional developer plans one continuous practice session due to time constraints of the course.

**Master Lesson File (MLF).** A compilation of documents that contain all the materials necessary to conduct a period of instruction or lesson.

**Mastery.** The achievement of the prescribed learning objective.

**Mastery Learning.** Criterion-referenced testing is the preferred method of testing for learning objectives taught in the formal school/training center. The criteria for test mastery are established by the learning objectives. The student, when completing a test, receives either a master (pass) or non-master (fail) for each learning objective. The student may be assigned an overall score, but it does not remove the responsibility of mastering each learning objective.

**Measurement.** The act of acquiring data in the educational environment without making value judgments regarding the relative or absolute merits of those data.

**Measurement Error.** The extent to which a score has been influenced by irrelevant or chance factors such as fatigue, practice, time between the instruction and the administration of the instrument, etc. Also, every test contains errors of measurement. No one test accurately measures a student's achievement or ability. Carefully designed standardized tests may have measurement errors of 5-10 percent. Teacher-designed tests have large measurement errors. A test result shows that a student falls into a range of scores and not just a single reported score. Focusing on a single score and ignoring the score range is among the most serious of score reporting errors.

**Media.** Means of presenting instructional materials to the learner; for example, filmstrips, videotapes, slides, wall charts, etc.

**Media Cues.** Used to remind instructors what media to use and when to present it during the lesson plan.

**Median.** The score above and below which 50 percent of the scores in the sample fall. Median is sometimes referred to as the "breaking score".

**Mean.** Arithmetic average of all scores.

**Mediated Instruction.** Includes such devices as power point, video, and audio used to present the planned course of instruction to the learner.

**Mental Skill.** Cognitive ability involving the processing, synthesis, and analysis of information.

**Military Occupational Specialty (MOS).** A four-digit code that describes a group of related duties and job performance tasks that extend over one or more grades. It is used to identify skill requirements of billets in T/Os, to assign Marines with capabilities appropriate to required billets, and to manage the force. It is awarded when performance-based criteria have been met as set forth in ITS/T&R Orders.

**Mission Essential Tasks (MET).** A MET is a collective task which an organization must be proficient in order to accomplish an appropriate portion of its wartime mission(s). MET listings are the foundation for the T&R manual; all event in the T&R manual support a MET.

**Mission Essential Task List (METL).** Descriptive training document that provides units a clear, war fighting focused description of collective actions necessary to achieve wartime mission proficiency.

**Mode.** The most frequently occurring score.

**Models & Mock-ups.** A model is a copy of a real object. It can be an enlargement, a reduction, or the same size as the original. The scale model represents an exact reproduction of the original, while simplified models do not represent reality in all details. Some models are solid and show only the outline of the object they portray, while others can be manipulated or operated. Still others, called mock-ups, are built in sections and can be

taken apart to reveal the internal structure. Whenever possible, the various parts should be labeled or colored to clarify relationships.

**Modular Instruction.** A prepackaged unit of instruction which typically contain a clear statement of objectives and all necessary learning resources to permit the learner to achieve these objectives. A module can be a complete unit or part of a course.

**Motivation.** Motivation interests the learner and focuses their attention on the lesson. The motivation for a lesson may be intrinsic or extrinsic. Intrinsic motivation refers to topics that students like or enjoy. Extrinsic motivation focuses on external rewards for good work or goal attainment.

**Nominal Scale.** Consists of descriptive categories. The number represents different categories in the set but has no mathematical meaning.

**Non-Discursive Communication.** Level of psychomotor domain (Simpson, Harrow, & Simpson) in which students communicate through bodily movements ranging from facial expressions to sophisticated choreographics; going from one movement to another in a specified order.

**Norm-Referenced Assessment.** An assessment designed to discover how an individual student's test scores are compared to scores on the test taken by a group of individuals who represent the target audience. Prevalent to aptitude and achievement tests that relate scores to a percentile. (Compare to criterion-referenced assessment.)

**Objectives-Oriented Evaluation.** Approach to evaluation that determines the extent to which learning objectives have been achieved (see criterion-referenced testing).

**Objectivity.** A characteristic of evaluation which requires that measurement in an educational environment be correct and factual and be free from instructor bias.

**Observation.** A form of evaluation conducted during practical applications, performance test, or on the job, where evaluators, instructors, or supervisors can observe the students' performance.

**Observation Checklist.** Evaluation instrument used to provide quality control and review effectiveness of instruction through the review of the Master Lesson File and the effectiveness of the lesson, activities, student materials, media, etc. as observed during a convening lesson.

**Occupational Field (OCCFLD).** A range of related military occupational specialties (MOS's) that share the same first two digits (e.g., 0300, 0311).

**Open-Ended Question.** A question that asks for narrative responses and allows respondents to respond in their own words.

**Operational Risk Management (ORM).** The process of dealing with risks associated with military operations. It includes risk assessment, risk decision-making, and the implementation of risk controls.

**Operational Test and Evaluation.** Approach to evaluation that determines whether a product represents a significant improvement or benefit over alternative products.

**Ordinal Scale.** Consists of categories arranged in a hierarchical order. The intervals between numbers that represent categories are not equal.

**Organization.** Level of affective domain (Krathwohl, 1956) in which students compare, relate, and synthesize new values into their own value systems.

**Overhead Question.** A question not specifically related to subject matter, but solicits a general response to the lesson.

**Panel.** A structured or unstructured discussion between two or more experts (generally excluding the regular instructor), presented in a variety of ways, such as constructive arguments followed by debate, response to questions from the instructor or the students, a preplanned agenda, a fixed or a random order of speakers, or free discussion.

**Part Practice Session.** A method of teaching that breaks down a task into parts. Used when tasks do not have highly interrelated subtask.

**Pedagogy.** Literally means the art and science of teaching children.

**Peer Teaching.** Method where instructors allow students to teach other students with the student available to clarify material presented unclearly.

**Perceptual.** Level of psychomotor domain (Simpson, Harrow, & Simpson) in which students interpret various stimuli (something that directly influences action) and make adjustments to the environment. Suggests cognitive as well as psychomotor behavior.

**Performance.** Part of a criterion objective that describes the observable student behavior (or the product of that behavior) against an established standard of performance as proof that learning has occurred.

**Performance Checklist.** The breakdown of a task into elements that must be correctly performed to determine whether each student satisfactorily meets the performance standards described in the objective.

**Performance Measure.** The absolute standard by which job performance is judged. It includes behaviors, results, and characteristics that can be observed and scored to determine if a student has performed a task correctly.

**Performance-Based Test.** Sample work situation that measures how well the student has mastered the psychomotor (physical) and cognitive (mental) skills required for task or job performance.

**Physical Activities.** Level of psychomotor domain (Simpson, Harrow, & Simpson) in which students perform activity requiring endurance, strength, vigor, and agility.

**Physical Skill.** Directly observable behavior requiring the movement of body muscles. Also referred to as psychomotor skill.

**Pilot Course.** A validation method used where instructional materials in final form are presented to a target population group.

**Population.** A well-defined group of subjects, things, or characteristics from which measurements are taken (for example, all students 6 feet or taller represents a specific population).

**Post-Graduate Survey.** Evaluation instrument to collect data from the graduates regarding a course previously attended.

**Posttest.** A test administered after the completion of instruction to assess whether a student has mastered the objectives of the class, lesson, course or other unit of instruction (see summative evaluation).

**Practical Application.** A technique used during an instructional session which permits students to acquire and practice the mental and physical skills necessary to perform successfully one or more learning objectives.

**Practice and Provide-Help Cues.** Practice cues describe the student's role in the practical application portions of a lesson, while provide-help cues describe the instructor's role.

**Predictive Validity.** We can establish predictive validity for our Correct Response to Test (CRT) in much the same fashion as we can determine concurrent validity. When we have two CRT measurements of what we believe to be the same skill or knowledge taken at a considerable length of time from each other, we may wish to determine how well the first CRT predicted success on the second CRT. We may wish to see how our school posttest predicts success on the job as measured by supervisor ratings. Or we may wish to determine how well a pencil-and-paper test can be used to predict future success on a performance exam. In these and similar situations, we can use various statistics to establish predictive validity between two CRT's as long as they are both scored on a pass or fail basis and the tests are separated by a substantial period of time.

**Prerequisite.** A requirement the student must possess before being able to receive instruction. It covers what a student must know before taking a lesson of instruction.

**Pretest.** A test administered prior to instruction to determine how much the student already knows (see formative evaluation).

**Primacy.** Material presented earlier or first.

**Printed Materials.** A form of visual information media that includes flat pictures, charts, diagrams, and graphs.

**Probe.** An unplanned instructor-initiated question used to seek clarification, probe for understanding, or to control the direction of the discussion; may be either direct or overhead question.

**Process Method.** Method used by evaluators to describe and document the actual development process of a specific course by use of a checklist.

**Process Testing.** Testing where the procedure or steps (tasks) used to get to the end result are used to evaluate the student.

**Product Testing.** Testing where the characteristics of a good product are used to evaluate the student.

**Program of Instruction (POI).** A training management document that describes a formal course in terms of structure, delivery systems, length, intended learning outcomes, and evaluation procedures.

**Programmed Instruction.** A method of instruction that usually includes a carefully planned sequence of small units of instruction which require the learner to respond to cues and receive immediate feedback. Various media (books, teaching machines, and computers) are used to deliver the programmed instruction to the learner.

**Progress Method.** Method used by evaluators to provide an audit trail that keeps management informed of the progress of the course development effort.

**Progress Test.** Tests administered throughout a course to evaluate student progress and to determine the degree to which students are accomplishing the learning objectives (see formative evaluation).

**Projected Still Images.** A form of visual information media that includes overhead transparencies and slides.

**Psychomotor Domain.** A major area of learning which deals with acquiring the ability to perform discrete physical skills requiring dexterity, coordination, and muscular activity.

**Psychomotor Skills.** Motor action directly proceeding from mental activity. Also referred to as physical skill.

**Qualitative data.** Qualitative data are subjective in nature. They emphasize standardization, precision, and reliability of measures of efficiency when evaluating training/education outcomes.

**Quantitative data.** Quantitative data are objective in nature and are gathered through standard methods (measures of efficiency, participant observation, interviews, etc.).

**Questioning Method.** Method used to emphasize a point, stimulate thinking, keep students alert, check understanding, review material, and seek clarification.

**Questionnaire.** A data collection instrument consisting of a printed form containing a set of questions used together information from respondents.

**Range.** The difference between the largest and smallest scores occurring in a distribution.

**Rating Scales.** Any number of instruments upon which instructors record their assessments of student performance through a process of observation or measurement and judgment.

**Ratio Scale.** Consists of categories arranged in hierarchical order that has equal intervals between categories (i.e., any two adjoining values in a ratio measure are the same distance apart). A true zero anchors the scale of a ratio measure.

**Reading Method.** Reading is the assignment to a student of printed materials including books, periodicals, microforms, manuals and regulations, and handouts (instructor-produced).

**Receiving.** Lowest level of affective domain (Krathwohl, 1956) in which students become aware of and pay attention to someone or something.

**Recency.** Material presented not long ago.

**Record of Proceedings (ROP).** The evaluation results and recommendations that are the result of the Course Content Review Board.

**Reflex Movements.** Level of psychomotor domain (Simpson, Harrow & Simpson) in which students perform an action without learning it in response to some stimuli (something that directly influences the activity).

**Reliability.** An indicator of score consistency over time or across multiple evaluators. Reliable assessment is one in which the same answers receive the same score regardless of who performs the scoring or how or where the scoring takes place. The same person is likely to get approximately the same score across multiple test administrations.

**Remedial Instruction.** Supplemental instruction designed to correct student misunderstanding of course material or a student learning deficiency. A sequence that provides an alternative, more basic approach to meeting the same instructional objective.

**Responding.** A level of the affective domain (Krathwohl, 1956) in principle which students act or comply with the instructor's expectations by performing an act and obtain satisfaction from it.

**Risk.** An expression of possible loss in terms of severity and probability.

**Risk Assessment.** The process of detecting hazards and assessing associated risks.

**Role-playing.** Students project themselves into simulated interpersonal situations and act out the parts of the persons and situations assigned by the instructor. Role-playing is generally limited to practice of the skills involved in interpersonal relations, such as counseling, interviewing, and conference leadership.

**Safety Brief.** A brief provided to make students aware of the identified hazards and the controls implemented to minimize risks.

**Safety Checklist.** Evaluation instrument used by instructors or the administration to ensure that proper safety procedures have been adhered to.

**Safety Questionnaire.** Student reaction form used to provide evaluation feedback on safety within the instructional environment.

**Scales of Measurement.** Method of measurement that specify how numbers assigned to variables relate to the property being evaluated or measured.

**Self-Paced Instruction.** Instructional method which permits a student to progress through a course of instruction at the student's own rate.

**Simulation.** Actual or mock-up of a piece of equipment that allows duplication of job performance.

**Site Visit.** Visit by formal school personnel to the Fleet Marine Force to observe and interview graduates.

**Skill.** The ability to perform a job related activity that contributes to the effective performance of a task.

**Skilled Movements.** Level of psychomotor domain (Simpson, Harrow, & Simpson) in which students perform a complex task with a degree of efficiency.

**Slides.** A piece of 35-millimeter film on which individual slides or frames appear in sequence. Some filmstrips are accompanied by a tape or disc that contains narration and a signaling device that indicates when to advance the filmstrip to the next frame. Depending on the type of projector, the film advances either manually or automatically.

**Small Critical Audience Rehearsals.** A process in which an instructor delivers a lesson plan in its entirety to a small group of instructor/peers to evaluate the delivery of a lesson.

**Socratic Method.** A conversation or discussion wherein two or more people assist one another in finding the answers to difficult questions. The method may resemble a guided discussion, but the goal is often to obtain specific answers to specific questions and not to stimulate discussion. This method facilitates the student's quest for understanding by requiring the student to answer questions on his/her own, to ponder the validity of what others have said or written, and to give reasoned support of his/her opinion to the other students in the group.

**Standard.** Part of a learning objective, the standard establishes a criterion for how well the task or learning objective must be performed.

**Standard Deviation.** Describes the amount of variability in a group of scores.

**Standing Operating Procedure (SOP).** A document that outlines the policies and procedures of an organization.

**Stem and Responses.** Makes up multiple choice test items. The stem presents a problem, question, statement, or situation, all information needed to answer the multiple-choice question. The response is made up of several possible responses where only one response is the correct answer.

**Storyboard.** A script sheet that shows key visualization points with accompanying video information.

**Student.** The individual receiving instruction, the individual learning from the interactive courseware, or an individual who has been placed in a learning situation to acquire knowledge and skills required for accomplishment of specific tasks.

**Student Data Form.** Form used to collect personal data from the student upon arrival at a course.

**Student Materials.** Additional facts and information given to the students as a study guide that can be referred to during the course and as a job aid that students can take back to their unit following completion of the course. There are two types of student materials, student outlines and supplemental student materials.

**Student Outline.** Student material which provides the student with a general structure to follow during the class and a conceptual framework that highlights the main ideas of the class.

**Student Query.** "Students asking questions" is often used in combination with other methods such as the lecture, the panel discussion, or the teaching interview, but it could be used by itself, either on a one-to-one basis in tutoring or coaching or as part of small or large groups. The method is student controlled, although the responder can also control the session to a certain extent if skillful enough. Students' questions may often be a measure of the degree of their understanding of a particular matter, that is, they "know enough to ask the right questions."

**Subject Matter Expert (SME).** An individual who has a thorough knowledge of a job, duties/tasks, or a particular topic, which qualifies him to assist in the training development process (for example, consultation, review, analysis, advise, critique).

**Summary.** A major section of a lesson, which follows an introduction and body. It should contain a summary, closure, and administrative directions.  
**Summative Evaluation.** Used to make judgements and determinations concerning student achievement and the effectiveness of the instructional program. Summative evaluations lead to grades, to reports about a student's relative level of competence, and to alterations of instructional programs. Also designed to collect data and information during the operational (field) tryouts of equipment/system in order to determine the effect of the instruction under operational conditions and to make any changes or revisions to the system prior to becoming operational.

**Supplemental Student Materials.** Any handout, other than the student outline, given to the students to support the instruction.

**Supportive Relationships.** Skills and knowledge in one learning objective have some relationship to those in another learning objective.

**Survey Test.** A survey test is designed to determine what prospective students already know and can do before receiving the instruction.

**Synthesis.** Level of cognitive domain (Bloom, 1956) in which students are able to put parts together to form new patterns or structures.

**Systems Approach to Training (SAT).** An orderly process for analyzing, designing, developing, implementing, and evaluating an instructional program which ensures personnel acquire the knowledge's and skills essential for successful job performance.

**Target Population Description (TPD).** The TPD provides a general description of the target population and establishes administrative, physical, and academic prerequisites that students should possess to be assigned to a formal school of instruction. The level of experience the average student

will bring into the classroom must be considered. Due to their lack of experience, entry-level students may not be able to comprehend multiple objectives in a single lesson.

**Task.** A unit of work usually performed over a finite period of time, which has a specific beginning and ending, can be measured, and is a logical and necessary unit of performance.

**Task List.** All designated T&R Manual events for inclusion in a POI.

**Taxonomy of Educational Objectives.** A systematic classification scheme for sorting learning outcomes into three broad categories (cognitive, affective, and psychomotor) and rank ordering these outcomes in a developmental hierarchy from least complex to most complex.

**Teaching Interview.** The instructor questions a visiting expert and follows a highly structured plan, which leads to educational objectives. The advantage of the teaching interview over the guest lecture is that the instructor controls the expert's presentation. The expert normally requires little or no advance preparation, but responds extemporaneously from general experience. When a question-and-answer period follows the interview, students can interact with the expert.

**Terminal Learning Objective (TLO).** A TLO is a statement of what a student is expected to perform upon completion of a lesson, topic, major portion of a course, or course completion.

**Test.** Any device or technique used to measure the performance, skill level or knowledge of an individual.

**Time Cues.** Approximations for the amount of time required for presenting each lesson component. Each component and main idea of a lesson plan has a time cue. The sum of all the main idea time cues equal the time cue for the body.

**Training.** Instruction and applied exercises for the attainment and retention of skills, knowledge, and attitudes required to accomplish military tasks.

**Training & Readiness (T&R) Event.** An individual or collective training standard.

**Transfer of Learning.** The extent to which what the student learned during instruction is used on the job.

**Transparencies.** An overhead transparency is usually made from acetate or plastic, which has been prepared for us on an overhead projector. If hand drawn transparencies are needed, materials such as heavy-duty, clear plastic bags, document protectors, and reprocessed x-ray film can be used in place of commercially produced acetate. In addition, transparencies can be made from existing printed material by using a thermoprocess machine and special film.

**Transitions.** Statements used by the instructor to move from the introduction of a lesson to the body, between main points between sub points within each main point, and from the body to the conclusion of the lesson. These statements show a logical relationship between the lesson segments they connect.

**Validation.** The process by which the curriculum materials and instruction media materials are reviewed by the contractor for instructional accuracy and adequacy, suitability for presentation, and effectiveness in providing for trainees' accomplishment of the learning objectives. Validation is normally accomplished in tryouts with a representative target population. The materials are revised as necessary as a result of the validation process.

**Validity.** A characteristic of evaluation, which requires that testing instruments measure exactly what they were intended to measure. A test with high content validity measures the material covered in the curriculum or the unit being tested. A test with high criterion validity successfully predicts the ability to do other work. For example a test to be an auto mechanic with high criterion validity will successfully predict who will become a good mechanic.

**Variability Attributes.** Characteristics shared by some, but not all, members of a class of people, object, events, ideas, or actions which are grouped together on the basis of shared critical attributes and called by the same concept name.

**Variance.** The average squared deviation from the mean variance is useful for determining how far off the mean students score on a particular test item or test.

**Valuing.** Level of affective domain (Krathwohl, 1956) in which students accept, prefer, or commit themselves to an object or behavior because of its perceived worth or value; to appreciate.

**Video Tele-Training (VTT).** Supports distance learning and video teleconferencing which allows us to send and receive presentations, allows students to interact with the instructors and students at distance sites and has the capability of connecting to more than 20 classrooms/sites around the world with one instructor teaching them all. This technology also has the capability of connecting to almost any kind of broadcast format.

**Virtual Conferencing.** Video teleconferencing that allows instructors the ability to send and receive presentations, and allow students the opportunity to interact with instructors at distance sites.

**Virtual Reality (VR).** Virtual reality is the computer-generated simulation of a real or an imagined environment or world. It can be graphics-based (e.g., a walk-through of a building) or text based (e.g., a description of a city where participants can interact with one another).

**Visual Learners.** Learners who tend to learn better by seeing.

**Whole Practice Session.** A method of teaching an entire task. Used when tasks have highly interrelated subtask.

**HIGH RISK TRAINING INSTRUCTOR PRE-ASSIGNMENT CHECKLIST**

1. **Prerequisites.** To be considered for assignment to a high-risk training instructor billet, all personnel must meet the following criteria (where applicable, hiring- or position-description criteria shall specify requirements for civilian personnel):

a. A minimum of two years left on their current enlistment (or agree to extend or reenlist) prior to executing such orders.

b. No court-martial convictions within the past 5 years and not more than 2 NJPs within the past 5 years (no more than 1 NJP in the 12 months preceding transfer date).

c. No drug-related incidents within the last 5 years and no alcohol-related incidents within the last 2 years preceding the transfer date.

d. Meet personal appearance and weight standards with no unresolved history of assignment to weight control or personal appearance programs.

e. Pass the PFT.

f. Complete an instructor-training course prior to executing orders (or during delay en route). Courses are currently taught at Camp Lejeune (M03XRGGA), Camp Pendleton (M10XRG1), and also by Mobile Training Teams from either of these bases (M03XRGM and M10XRGM). Personnel having successfully graduated from Navy Instructor Training School (receiving an NEC of 9502) are excluded.

2. **Medical Screening.** Coordinate with the detaching command to request a medical record screening. Any findings suggestive of a behavioral problems or difficulty in interpersonal relationships, such as any medically documented problems related to hypertension, stress, alcohol related or psychological dysfunction, etc., are potentially disqualifying and must be identified.

3. **Findings.** A report summarizing the results of the prerequisites and Medical Screening findings will be forwarded to the formal school or detachment commander.

**HIGH RISK TRAINING INSTRUCTOR COMMAND SCREENING GUIDE**

1. Objective. Training activity COs are ultimately responsible for ensuring high-risk instructor candidates are screened for professional, physical, and psychological suitability. This guide will assist COs in conducting screenings appropriate to the training environment and risk/stress level. While the instructor screening process must begin at the detaching activity, it is the responsibility of the gaining activity to inform the detaching activity that the candidate will teach high-risk curricula and the level of screening required. The outline below describes the screening process and identifies the majority of physical and psychological factors that could disqualify someone for high-risk instructor duty.

2. Screening and Interview Sequence

a. Upon identifying a candidate for high-risk instructor duty, the gaining activity shall contact the detaching activity and provide appropriately tailored screening requirements and forms for recording screening milestones. The candidate must be fully screened periodically to the standards outlined below. Training activity COs may wish to repeat portions of the screening, but all training activities shall interview incoming instructor candidates. Subparagraphs 2b(3)(a) through 2b(3)(c) below provide some helpful guidelines in determining suitability.

b. All high-risk instructor candidates shall have the following procedures completed:

(1) Service Record Screen. Any adverse administrative entries, below average performance evaluations, non-judicial punishments, etc., shall be brought to the COs attention prior to the interview. The training activity CO may delegate record screening authority to a subordinate within the command.

(2) Physical Requirements. The candidate must meet general duty criteria, physical readiness requirements, and any special duty qualifications required by chapter 15 of the manual of Medical Department (MANMED), such as diver, flight, or firefighter requirements.

(3) Medical Officer Interview, Record Review, and Questionnaire

(a) Candidates shall complete OPNAV 1500/53. This questionnaire shall be forwarded as an enclosure to the request for medical screening and interview.

(b) Competent medical authority (i.e., medical officer, physician assistant, nurse practitioner (family practice), or independent duty corpsman) shall conduct the medical record screening.

(c) For high-risk instructor candidates, an interview shall be conducted in conjunction with the medical record review. Areas of concern and suggested questions are provided in the Medical Officer's Interview Guide located on page 6 of enclosure (2) within this document. Training activities shall provide these questions as an enclosure to the request for medical screening and interview for high-risk instructor candidates only.

(d) The medical activity completing the screening shall forward the results to the requesting CO or OIC utilizing the sample Results of Medical Screening provided on page 8 of enclosure (2) within this document.

(4) CO's Interview. The CO's interview is required for high-risk instructor candidates. The interview shall be conducted following the service and medical record screening, and medical officer interview. The CO's interview must assess how specific factors have affected and will likely affect a candidate's performance in a high-risk training environment. This interview is the final factor in determining suitability for high-risk instructor duty. The areas of concern, with suggested questions, are provided on page 9 of enclosure (2) within this document. The training activity CO may delegate interviewing authority to a subordinate within the command.

### 3. Determination of Suitability

a. The following criteria outline serious risk issues that provide cause for disqualification for high-risk or instructor duty:

(1) Chronic medical condition, which hampers the candidate's ability to perform training duties.

(2) In-service hospitalization for a major mental disorder such as a psychotic disorder, bipolar disorder, major depression, or suicide ideation or behavior.

(3) In-service diagnosis of personality or impulse control disorder.

(4) Any confirmed incident of child or spousal abuse (by member).

b. The following criteria outline risk issues that must be closely investigated, would likely require specialty referral for expert evaluation, and may be cause for disqualification from consideration as a high-risk instructor:

(1) Disciplinary problems/adverse service record entries.

(2) Poor work performance trends.

(3) Incident resulting in referral to family advocacy.

(4) Medically noted traits of a personality disorder not sufficient to support diagnosis of personality disorder.

(5) Treatment for a substance use disorder within the last 2 years (still in the aftercare period).

(6) In-service outpatient treatment for evaluation or therapy for suicide ideation, threats to harm others, or other mental health problems.

c. Candidates must meet any specific guidelines in the MANMED, chapter 15, for general duty criteria, and any special duty qualifications.

d. Based on screening results, the detaching CO shall recommend, via service record entry, whether or not the candidate should be assigned to high-risk instructor duty.

e. If the gaining activity declines the candidate based on the detaching activity's negative recommendation for high-risk instructor duty, the detaching activity shall request M&RA reassign the candidate to other than high-risk instructor duty.

f. If the gaining activity accepts the candidate, they shall interview the candidate and review the results of the screening.

g. A service record entry shall be made indicating the candidate's suitability/unsuitability for high-risk instructor duty. This entry shall be signed by the training activity CO or designated representative. The service record entry shall not identify reasons for unsuitability.

(Sample Letter)  
REQUEST FOR MEDICAL SCREENING

\_\_\_\_\_  
(Date)

From: Commanding Officer, \_\_\_\_\_  
To: OIC, \_\_\_\_\_ Branch Medical Clinic

Subj: REQUEST FOR MEDICAL SCREENING FOR HIGH-RISK INSTRUCTOR DUTY,  
ICO \_\_\_\_\_

Ref: (a) OPNAVINST 1500.75B

ENCL: (1) OPNAV 1500/53 (Oct 2009) Medical Questionnaire  
(2) Medical Officer's Interview Guide  
(3) Results of Medical Screening

1. Request you conduct the following medical evaluation to assist us with screening subject named member for possible duty as a high-risk instructor per reference (a):

a. For High-risk Instructor Candidates Only. Complete enclosure (1) and submit to medical officer for review.

b. Screen medical record of subject candidate in his/her presence. Screening must be conducted either by the medical officer, physician assistant, nurse practitioner (family practice), or independent duty corpsman.

c. Enclosure (2) is provided to assist you in conducting the medical record screening and interview. Enclosure (3) is provided to assist in reporting a determination as to whether any disqualifying factors are present.

2. The reviewer may request a specialist referral if the review reveals a need for it. The results of the medical screening must be forwarded to the requester and recorded in the candidate's medical record.

3. My point of contact is \_\_\_\_\_  
(Name) (Phone)

\_\_\_\_\_  
(Signature)

**MEDICAL OFFICER'S INTERVIEW GUIDE**

The following are suggested topics for the medical interview. For any issues that are not resolved to your satisfaction during the interview, refer for specialty consult or evaluation. Look for signs of stress or annoyance in the candidate when discussing these issues, especially regarding abusive behavior and substance abuse.

**Interpersonal Relationships/Job Adjustment**

1. Have you ever been referred to a physician or chaplain due to personal or work-related stress that adversely affected your performance?
2. Have you any history of spousal/child abuse or suicidal behavior?
3. Have you experienced any anxieties or phobias that have caused you to be removed from a particular work environment?

**Mental/Physical Health**

1. Have you consulted a civilian health care provider within the past year? (As appropriate, the medical reviewer should obtain records from the civilian physician.)
2. Are you currently taking prescription medications? Will the condition affect your ability to perform duties?
3. Have you ever gone before a medical board? (A copy must be available in the candidate's health record.)
4. Is there any documented history of psychological or physiological reaction to stress, tension, vascular headaches (recurrent), upper respiratory symptoms, and unstable hypertension? (Explore any history of emotional problems that would suggest vulnerability to maladaptive stress coping, such as adjustment (situational) disorders, depressive episodes, recurrent anxiety.)
5. Have you ever been concerned at any time about your emotional health or ability to cope with stress?
6. Have you ever sought psychological counseling by a physician, psychologist, priest, social worker, etc.?
7. Have you threatened suicide or any other self-destructive behavior?
8. Have you ever threatened to hurt another individual?
9. Have you ever experienced persistent irrational fear or phobias such as flying, high places, confined spaces, water, etc.?

10. Do you have a problem with anger, recurrent anger, or controlling anger?

Substance Abuse

1. Have you ever consumed alcohol during work hours or come to work hung over, requiring a referral for competency for duty?
2. Have you ever been referred for evaluation for substance abuse?
3. Have you ever been involved in an alcohol-related incident?
4. Have you ever had concern about your drinking pattern or experienced guilt or remorse for behavior that occurred while drinking?
5. Has alcohol ever caused any family, personal, or work difficulties? (Specifically address driving under the influence (DUIs), fights, quarrels, and tardiness or missing work.)
6. Do you have a history of drinking excessively?
7. Do you drink early in the day?
8. Has anyone criticized your drinking pattern or advised you to change your drinking pattern?
9. Have you ever-experienced blackouts?

Interpersonal Relationships

Was the candidate abused as a child (physically, emotionally, or sexually)?

Documented History of Impulsive Behavior

1. Is there any evidence of untreated alcohol abuse or alcohol dependence? (At least 1-year post treatment with an adequate documented recovery program is required prior to accepting orders as a high-risk instructor)..
2. Is there any psychiatric diagnosis of personality disorders? (Applicable in the case of any psychiatric diagnosis requiring medication or hospitalization unless symptom-free for 1 year and declared fit for full duty by a formal medical board.)

(Sample Letter)  
RESULTS OF MEDICAL SCREENING

\_\_\_\_\_  
(Date)

From: OIC, \_\_\_\_\_  
To: Command Officer, \_\_\_\_\_

Subj: REQUEST FOR MEDICAL SCREENING FOR HIGH-RISK INSTRUCTOR DUTY,  
ICO \_\_\_\_\_

The requested screening and interview have been completed. Information does/does not indicate that there are potentially disqualifying factors in the instructor's medical history. The candidate is/is not suitable for high-risk instructor duty.

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
(Signature)

**COMMANDING OFFICER'S INTERVIEW GUIDE**

The following are suggested topics for the CO's interview. For any issues that are not resolved to your satisfaction during the interview or commented on by the medical reviewer, refer to your health care facility for specialty consult/evaluation. Look for signs of stress or annoyance in the candidate when discussing these issues, especially regarding abusive behavior and substance abuse.

**Interpersonal Relationships/Job Adjustment**

1. Have marital problems, financial problems, or family advocacy issues ever adversely affected your work performance?
2. Have you ever had problems relating to your supervisors?
3. Have you been a supervisor? Are you comfortable in that role? Have you had problems dealing with subordinates?
4. Have you had disciplinary problems or lost your temper in the work place?
5. Do you understand and adhere to guidelines for sexual harassment, core values, and personal discrimination?
6. Have you switched rank/rates or had problems advancing in rank/rate?
7. Have you ever been counseled for fighting, writing bad checks, indebtedness, or unauthorized absence (UA)?
8. Since enlistment/commissioning, have you ever been arrested?

**Interpersonal Relationships** (Using information obtained from service records review or interview, address the following areas.)

1. How many times has the candidate been engaged, married, or divorced? (More than twice should raise concern).
2. Does the candidate have broken active duty? If yes, explore the reasons.
3. How many times has the candidate been fired from a job?
4. During broken service, was the candidate unemployed for 6 or more months?

Documented History of Impulsive or Aggressive Behavior (This information may be substantiated by service record review.)

1. Since entering the Naval Service, has the candidate been involved in two or more fights or physical altercations? If so, these must be thoroughly evaluated. This is especially important if injuries occurred.
2. The candidate must be specifically asked about civilian arrests and asked to provide information. More than one misdemeanor arrest or any felony arrest must be fully evaluated.
3. Has the candidate ever been suspended or expelled from school? More than once may be significant. The interviewer must explore the number of times and the reason. Concern should be raised if this occurred during his/her high school years.
4. Does the candidate do things without thought that get him/her into trouble? (Examples might include impulsive spending, speeding tickets, going UA or saying things in anger that later have to be retracted.)
5. Is there a documented history of unreliability or has there been a concern about irresponsible behavior?
6. Is there any documented history or recurrent indebtedness, gambling, or misuse of personal funds significant enough to be drawn to command attention?

**NOTE:** When instructor candidate is referred to the local medical facility for mental health evaluation, it must entail, at the minimum, a standard diagnostic interview conducted by a qualified mental health professional. Hospital corpsmen or other such individuals are not satisfactory for this purpose. Any indicated psychometric testing may be utilized. The mental health professional must report on the SF 513 Medical Record -Consultation Sheet any diagnoses using criteria of DSM-III-R, Diagnostic and Statistical Manual of Mental Disorders, Third Edition, Revised. A professional opinion must be rendered regarding the psychological suitability of the candidate for the proposed high-risk instructor billet.

## FORMAL SCHOOLS SEAT COORDINATING INSTRUCTIONS

1. Marine Corps Training Input Plan (TIP). This is a five-year training plan that represents a deliberate effort to identify all formal learning requirements. It also represents the cornerstone for out-year budget plans, and it serves as the basis for allocating funds for centrally controlled programs. The TIP provides the schoolhouse, HQMC, and MCCDC the ability to conduct long term planning, programming and budgeting actions. The Deputy Commandant for Manpower and Reserve Affairs (DC, M&RA), Commander, Marine Forces Command, Commander, Marine Forces Pacific, Commander, Marine Forces Reserve, Commander, Marine Forces Special Operations Command, and Occupational Field Managers all provide requirements for this plan. The Training Input Plan is developed and maintained by Formal Schools Training Branch, TECOM (C 4611).
2. Requirement Sponsors. In general, CMC (M&RA) provides all entry-level (active and reserve, officer and enlisted), all lateral move, and some skill progression (normally, all skill progression which leads to a primary MOS (PMOS)) learning requirements used to develop the TIP. MARFORRES provides all non entry-level SMCR requirements, while Occupational Field Managers provide non-PMOS and some skill progression (non-PMOS) requirements for the TIP. M&RA (MP/RA) develops current and out-year plans for entry-level training and other active component PMOS training and submits them for entry into the TIP. MARFORRES submits reserve component PMOS requirements for post entry-level training.
3. Processing Cycle. CG, TECOM (C 4611) publishes the TIP annually per the TIP Processing Schedule. There are two key reasons for the TIP processing schedule: it allows the Marine Corps to align its training requirement development time-line with that of the other Services, and it aligns our training requirement development process with the Program Objective Memorandum (POM) and Budget processes.

The basic steps in the TIP process are summarized below: (PFY = Present Fiscal Year)

- |        |  |
|--------|--|
| 1 Aug  | TECOM (C 4611) initiates requirement solicitation process via e-mail announcement to all requirement generators in preparation of the upcoming TIP.  |
| Nov    | TECOM (C 4611) releases naval message and supporting e-mails specifying the requirement for all requirements sponsors (manpower planners, OccFld Managers/MOS Specialists, MARFORRES, etc.) to submit best estimate training requirements to C 4611 by 15 Jan                            |
| 15 Jan | TECOM (C 4611) receives TIP inputs from all requirement generators, commences review and validation of sponsors' best estimate requirements. In preparation for the TIP Conference, C 4611 programs validated requirements into the TIP Conference Tool within MCTIMS Student Registrar. |
| Mar    | TECOM (C 4611) conducts annual TIP conference for PFY+1 through PFY+6. All requirement sponsors must attend the conference.  |
| Apr    | TECOM (C 4611) staffs "Final" TIP [PFY+1] to CG, TECOM for signature.  |

- 1 May       TECOM (C 4611) publishes & distributes the training input plan for next fiscal year [PFY+5]. Distribution is via Marine Corps Training Information Management System (MCTIMS) website.
- 1 Jun       Receive all class schedules from all schools for the next fiscal year [PFY+1].
- 1 Jul       Validate class schedules and spread allocations for next fiscal year [PFY+1].
- 15 Jul      TECOM (C 4611) publishes Class Schedules and Seat Allocations for next Fiscal Year [PFY+1] in MCTIMS Student Registrar module.

#### 4. Execution

a. The objective of the TIP conference is to finalize solicited TIP requirements from recognized requirement sponsors, and to finalize the validation of the training track and course data managed by C 4611. The conference is approximately 3 days in length and covers every formal course approved by CG TECOM. Face-to-face coordination between C 4611, Occupational Field Managers, and MARFORs, along with requirement comparison with historic throughput are advantages of the conference that make it vital to TIP development. For this reason, C 4611 will not entertain TIP submissions received outside of the TIP process and the TIP conference unless the submitting activity conducts all coordination that would have been accomplished through the process and during the conference. Throughout the TIP process, learning requirements are entered directly into Student Registrar for compilation into the TIP.

b. Once published, the TIP functions as the baseline document for C 4611 to produce Training Quota Memoranda (TQM) during the execution year. Comptroller (C 464) uses the TIP to determine the dollar costs associated with projected training. It is also used by Manpower Management (C 460) to evaluate instructor requirements, and schoolhouses use it to produce course schedules and to program resources to support training.

c. For all MOS and individual course requirements, M&RA, Occupational Field Managers and MARFORRES training specialists must determine what their learning requirements will be for the present fiscal year plus one year, and make projections for the following four out-years. We recognize that most Occupational Field Managers and MARFORRES planners do not have the same planning tools as the manpower planners at M&RA.

However, they must consider all issues that will impact the need for training and provide their best-educated estimate of what is both necessary and feasible. This is extremely important because the TIP is the basis for budgeting and funding travel, per diem, and school overhead costs; manpower requirements, in terms of instructors, are also based on it. If we overestimate either the need or availability of Marines to train, we may over-obligate funds or program seats we won't use. On the other hand, if we underestimate our need, we will have to make special efforts to fund and obtain unplanned school seats. This process is especially critical with respect to other Service (Army, Navy, and Air Force) training. Often, our quotas to other Services' courses are tied to instructor and budget support. This support has been established by formal or informal agreements based on student throughput. If that throughput changes, we will be asked to increase

our instructor and monetary support. Since it is extremely difficult to identify structure and money to compensate for non-programmed requirements, every possible effort must be made to ensure training requests are absolutely valid and supportable. Therefore, every available information source must be used to determine accurate training needs. Some, but not all, of the possible information sources are the Tables of Organization (T/O), the assignment monitors at M&RA (MMOA/MMEA), Marine Forces training coordinators, knowledge of upcoming changes (equipment, structure, mission, etc.), MCCDC (C 46), and MPP.

d. All requirements submitted through the TIP process, will be compared to the average of the last 3 years throughput, as reflected in the MCTIMS Student Registrar. Any requirement submissions not justified by MCTIMS throughput will be denied unless significant justification is provided.

5. Training Input Plan Changes. The training process is dynamic and requirements will inevitably change. Please remember the TIP is a planning document and actual training execution may vary. As changes occur during the course of each execution year the TQM, which identifies courses, classes, and student quotas, will be updated. The updated TQM will be loaded into the Student Registrar and the MCTIMS Website (<https://timsapp.tecom.usmc.mil>). For this reason, MCTIMS Student Registrar is your primary source for course, class, and quota information during the execution year.

6. Requirements/Training Constraints. The requirements listed in the TIP are the projected number of students who need to be trained during the FY to meet USMC manning and MOS needs. Inability to meet the requirement degrades operational readiness and leads to a backlog of Marines awaiting training. Therefore, schoolhouses must strive to train to the stated requirement. Specifically, schoolhouses must endeavor to schedule their classes to provide sufficient capacity during each trimester in order to meet the requirement for that trimester (refer to TIP/TQM Reference Guide on the MCTIMS Website for a complete explanation of "Trimesters"). If a course of instruction's capacity is constrained and the requirement cannot be met, the schoolhouse must aggressively determine the nature of the constraint (instructors, facilities, equipment, billeting, funding, etc.) and immediately report it to the CG, TECOM (C 46)/Training Command (C 47).

7. Validation Requirement. On 13 June 2005, the Marine Corps began using the Student Registrar as the sole source of data to validate training utilization, training requirement estimates, and funding for training quotas. This means that C 4611 will measure course utilization for each year and compare it to the sponsors' stated formal learning requirements for the year. By collecting this data, C 4611 will provide a measure of effectiveness for requirement planning and actual training execution. C 4611 will also use the data to justify our formal learning requirements with the other services and in the budget process. To ensure we have accurate and timely information in Student Registrar, it is absolutely essential that schoolhouses validate their class convening rosters in Student Registrar within 5 calendar days of class convening date. Schoolhouses must subsequently validate class completion rosters in Student Registrar within 7 calendar days of graduation. Use of Student Registrar is mandatory.

## HIGH-RISK TRAINING COURSES AT FORMAL SCHOOLS

## MARINE CORPS FORMAL COURSES

## East Coast

Quantico, VA:

M02M729 METHODS OF ENTRY COURSE  
M02GPR9 METHODS OF ENTRY SUPERVISOR COURSE

Camp Lejeune, NC:

M031302 BASIC COMBAT ENGINEER  
M0381KB COXSWAIN SKILLS (CRRC/RRC)  
M03ACC2 COMBAT ENGINEER OFFICER  
M03ACS2 COMBAT ENGINEER NCO  
M03H4JB SMALL BOAT COXSWAIN (RIVERINE) PHASE II

Dive School, Panama City, FL:

N2016H1 MARINE CORPS COMBATANT DIVER COURSE

SERE School, Brunswick, ME:

N51M5Q1 SURVIVAL, EVASION, RESISTANCE, AND ESCAPE (SERE)

EWIGLANT

## West Coast

Bridgeport, CA:

M24M7A1 SUMMER MOUNTAIN LEADERS  
M24M7B1 WINTER MOUNTAIN LEADERS

Coronado, CA:

N28M5Q1 SURVIVAL, EVASION, RESISTANCE, AND ESCAPE (SERE)

Camp Pendleton, CA:

M10AHK2 BASIC RECONNAISSANCE

EWIGPAC

K0410014 FIRE SUPPORT MAN  
K0620016 OFFSHORE PETROLEUM DISCHARGE SYSTEM OPDS SINGLE ANCHOR LEG MOOR  
(SLAM) TECHNICIAN  
K2E8111 COXSWAIN SKILLS  
K2E3742 BASIC SCOUT SWIMMER  
K2E3745 INFANTRY COMPANY SMALL BOAT RAID COURSE  
K0103921 MARINE COMBAT INSTRUCTOR OF WATER SURVIVAL TRAINING