



MCTP 7-20A

Unit Training Guide



U.S. Marine Corps

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FOREWORD

Marine Corps Tactical Publication (MCTP) 7-20A, *Unit Training Guide*, contains guidance for Marine leaders at all levels on how to plan, conduct, and evaluate Marine Corps training. This publication provides a description of training fundamentals and how leaders at all levels apply them to the planning and conduct of standards-based training. It details how Marine leaders ready their units for the rigors of combat by leveraging a systematic process to develop training plans, training events, and exercises.

MCTP 7-20A provides the authoritative basis for how the Marine Corps trains in preparation for operations across the competition continuum; however, it does so without prescribing techniques or procedures. It is not intended to mandate procedures or checklists and instead aims to present a way of thinking about training. It reflects a time-tested training process developed over decades to improve the overall training effort in the Marine Corps.

The *Unit Training Guide* is not meant solely as a reference manual and should be read from cover to cover. Its four chapters have a natural progression. Chapter 1 describes the Marine Corps philosophy and fundamentals of training. Chapter 2 describes the application of the training fundamentals so the reader can apply the SATE process to training and conduct evaluation in accordance with chapters 3 and 4, respectively.

Marine Corps Tactical Publication 7-20A cancels MCTP 8-10A, *Unit Training Management Guide*, dated 25 November 1996, erratum dated 2 May 2016, and change 1, dated 4 April 2018; and MCTP 8-10B, *How to Conduct Training*, dated 10 August 2005, erratum dated 2 May 2016, and change 1, dated 4 April 2018.

Reviewed and approved this date.



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CHAPTER 1.

THE MARINE CORPS PHILOSOPHY AND FUNDAMENTALS OF TRAINING

INTENT

Marine Corps Tactical Publication (MCTP) 7-20A *Unit Training Guide* provides time-tested and enduring general guidance to Marine Corps unit and training leaders at every level. It aligns closely with the tenets espoused in Marine Corps Doctrinal Publication (MCDP) 7, *Learning*, and it is supported by Marine Corps reference publications (MCRP) that amplify its descriptive guidance in several specific areas of emphasis (see Figure 1-1). Together, the publications in this hierarchy update and replace the guidance originally found in MCTPs 8-10A, *Unit Training Management Guide*, and 8-10B, *How to Conduct Training*, with the intent of streamlining and updating essential training information necessary for all leaders to understand and apply.

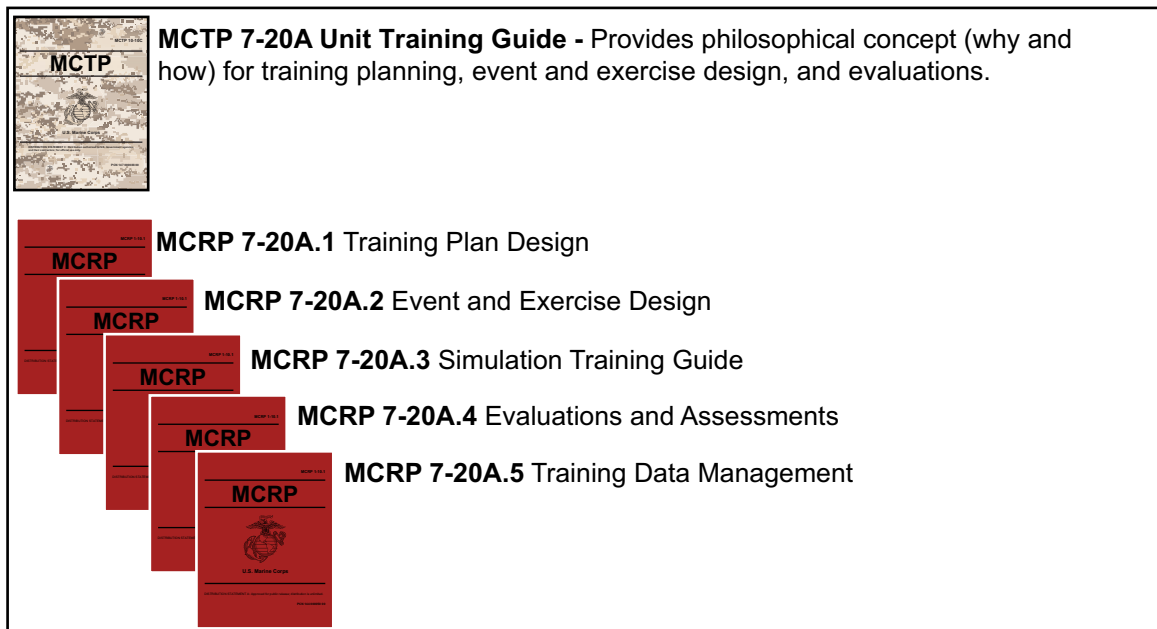


Figure 1-1. Training Publications Hierarchy.

PHILOSOPHY

The history of battle and the wisdom of military philosophers all confirm the direct correlation between training and victory in battle. Leaders are responsible for all unit training and must constantly plan, conduct, evaluate, and assess training. Combat units fight as they have been trained. To ensure successful combat units, the Marine Corps developed the basic philosophy that all Marine Corps training must have mandates, imperatives, and requirements.

Mandate for Training

The mandate for training is simple and compelling: the Nation must have Marine Corps units ready for combat. Combat-ready units are organized with motivated, disciplined, and proficient Marines, led by tactically and technically competent officers and noncommissioned officers, and conditioned through physically and mentally rigorous training. Quality training in the Marine Corps must be a way of life.

The Imperative for Training

Training is a moral and professional imperative. The Marine Corps is responsible for ensuring the Fleet Marine Force (FMF) is organized, trained, and equipped. Training encompasses the full range of Marines' duties, responsibilities, and missions. Training must be embedded in all that Marines do, all of the time. It can be as simple as practicing an individual task or as complex as conducting a joint or combined field training exercise with an opposing force. Training can vary from a squad leader informally making an on-the-spot correction to a company commander teaching lieutenants how to apply tactical principles on terrain. Continuous training ensures mastery of critical individual and collective skills, from weapons employment to vehicle maintenance and staff communication. The ability to instinctively follow procedures, execute techniques, apply tactics, and integrate the capabilities of arms and services to achieve the commander's intent comes from training.

Requirements for Training

Because the Marine Corps trains to prevail in operations across the competition continuum, the evolving battlespace drives the direction and goals of training. These goals are translated through mission-essential tasks (METs) and training and readiness (T&R) events. The modern battlespace makes rigorous physical, psychological, and moral demands that require both tangible and intangible qualities. It demands the ability and willingness to fight. It requires stamina, strength, agility, and dexterity combined with skills, knowledge, creativity, and imagination. Discipline, motivation, initiative, and courage are essential. Teamwork, camaraderie, cohesion, and leadership are all vital in developing the excellence and *esprit de corps* required for success. Training must make Marines resilient enough to survive and win under conditions of severe hardship, searing emotion, and extreme danger. Training hones a Marine's knowledge, teaches the requisite skills, cultivates the attitudes, and forms the habits needed to fight and win throughout the battlespace. Training prepares Marines to exploit opportunities and act correctly, boldly, innovatively and in consonance with one another and the mission.

PUTTING TRAINING PHILOSOPHY INTO PRACTICE

The purpose of training is to achieve readiness. Training aims to prepare the unit to perform its operational mission. Well-organized training generates an *esprit de corps* that permeates a unit and inspires and motivates Marines. Far too often, Marines do not receive the maximum benefit of training because they participate without understanding the unit training program's readiness objectives. Leaders must help their subordinates understand the connection between the training program and unit training standards to allow them to participate in the training in a more meaningful fashion. In every training event and exercise, unit leaders at all levels must understand and share the readiness objectives they aim to achieve during the event. They must drive their units to mastery of those objectives. By applying the training principles, they create training objectives that parallel and drive the operational objectives in all training events and exercises.

Education and Training

The Systems Approach to Training and Education (SATE) is the Marine Corps' process for designing learning environments from formal schools to unit-level training. Inputs and outputs throughout the process vary depending on the learning environment, but the steps are the same (see Chapter 2, paragraph on SATE phases). The SATE marries the unique objectives inherent to purely training and purely education, although neither can be fully divorced from the other. In the training environment, Marines learn to develop knowledge, skills, and attitudes (KSAs) in accordance with T&R standards and outcomes. Through repetition and progressive T&R standard attainment, Marines grow competencies and capacities to effectively and efficiently move, shoot, and communicate. On the other hand, the education environment arms Marines at all levels to increase their competency and capacity to make decisions. Woven together, training and education collectively develop a bias for creativity in applying trained skills and intuition to determine a course of action. Training and education grow Marines' capacity to sift through multiple inputs in real time. They develop competencies that enable Marines to truly understand what is taking place, use that understanding to make decisions, and act on those decisions.

Even as units and training leaders apply the SATE process to design and execute unit-level training, they must understand the integral and complementary role of education in developing individual Marines. Both training and education are necessary for a unit to achieve readiness goals. Unit readiness relies not only on skills and procedures developed in training but also on the Marines' capacity to make decisions and understand what is going on around them, competencies fostered through education. Unit training must afford Marines the freedom to experiment and make mistakes in order to learn to assess the operational environment, develop ingenuity in problem solving, and apply the unit's skills to solve the problem.

Training is an Operation

"We are closing with the enemy, in contact with the enemy, or training to fight" is a refrain familiar to all Marines. Much like a campaign plan describes a series of combat operations, a training plan creates an organized series of training events and exercises designed to achieve combat readiness. Outstanding training is not an accident; it is the result of deliberate planning that begins with problem framing and the commander's estimate. Just as the war planner applies the principles of war when creating an operation order, the training planner applies the principles of training when creating a training plan, training event, or exercise.

FUNDAMENTALS OF TRAINING

Based on the above philosophy, the 39th Commandant of the Marine Corps, General Alfred Gray, Jr., improved Marine Corps operational capability and warfighting effectiveness by focusing and revitalizing training and education institutions and processes throughout the Corps. General Gray noted the fundamentals of training are central to the future success of the Marine Corps. Such fundamentals provide sound and proven direction and are sufficiently flexible to accommodate the demands of local conditions and the judgment of commanders and other leaders. The following paragraphs provide an overview of the fundamentals of Marine Corps training.

All Leaders Lead Training

Leaders at all levels are responsible for the training and performance of their Marines and units. This notion is foundational to the 11 Marine Corps Leadership Principles. Therefore, leaders at the lowest level must understand how to conduct training. Their presence and involvement demonstrate that training is the number-one priority. Training the chain of command is an inherent part of this principle: battalion commanders train company commanders, company commanders train platoon commanders, and so on. Delegating authority is vital to the leader's teacher-trainer role; it is critical in developing subordinates and fostering initiative and innovation. By delegating authority, leaders give subordinates both the opportunity and responsibility necessary to train on their own.

MCDP 1, *Warfighting*, states, "In order to develop initiative among junior leaders, the conduct of training—like combat—should be decentralized. Senior commanders influence training by establishing goals and standards, communicating the intent of training, and establishing a main effort for training. As a rule, they should refrain from dictating how the training will be accomplished."

Train As You Fight

Marines train for the rigors of combat. To grow Marines' capacity to cope with the complex, stressful, and lethal situations they will encounter in combat, all training should strive to simulate battlespace conditions to the greatest extent possible. Units train to perform the tasks and meet the standards necessary to accomplish their operational missions. "Training programs should reflect practical, challenging, and progressive goals beginning with the individual and small-unit skills and culminating in a fully combined arms MAGTF" (MCDP-1).

The cornerstone of today's Marine Corps is the combined arms team. At the fire team level, the fire team leader utilizes rifles, grenade launchers, and automatic weapons to fight as a basic combined arms team. As the combat power progresses to higher echelons, combined arms operations provide the focus for specific training requirements for combat support, combat service support, and aviation elements to rearm; resupply; evacuate casualties; recover equipment quickly; and integrate indirect fires, electromagnetic warfare, aviation, engineers, and air defense. Synchronizing critical tasks such as jamming the right enemy signals at the right time to support the planned maneuver must be routinely practiced. The Marine Corps trains well so that it will fight well during conflict.

Training is Standards-Based

Training events must conform to the Marine Corps T&R standards. Training and readiness events describe the conditions, standards, and behaviors that enable leaders to determine when Marines and units have achieved the standard for qualified readiness documentation. Standards enable Marines and all unit elements to function in combat when actions must be reflexive and automatic. They also eliminate the need for retraining when units are cross-attached. They also foster flexibility in battle by reducing the need for complex orders. The doctrine, tactics, techniques, and procedures used by Marines to train, operate, maintain, and fight must be common across the Marine Corps. Standards-based training makes maximum use of training time, promotes the performance of replacements during conflict, and builds confidence in Marines and units.

Mission-Oriented Training

Training plans derived from the mission-essential task list (METL) maximize training benefit. Problem framing provides a careful assessment of the unit's operational mission, distills specific and implied tasks, and develops a METL. In other words, units do not train for Marine Corps Combat Readiness Evaluation (MCCRE) tasks not dictated by the unit's mission. Rather, the unit's METL is the basis for its training plan, training events, and exercises and serves as the outcome of unit training plans. The T&R standards represent key learning objectives that, when attained, demonstrate a unit's readiness to execute various METLs. Training and readiness standards are the foundation for Marine Corps training.

Train to Sustain Proficiency

Once units have trained to a required level of proficiency, they must sustain it. To sustain proficiency, commanders must continuously evaluate performance and design training plans to correct weaknesses and reinforce strengths. Commanders who design training programs merely to peak at one or two key events during the year do so at significant risk since war may begin without warning. The MCCRE is but one tool that the commander uses to evaluate the effectiveness of home station training. Evaluation is continuous even as the unit goes through the process of training, evaluating results, analyzing the feedback, and retraining to strengthen weak areas and sustain proficiency.

Training is Progressive

As individual and collective training progresses, the required capabilities and conditions must become more complex and challenging. The progression of difficulty should ensure Marines and units are continually challenged while also reinforcing previously learned tasks and behaviors. The concept of progressive training is frequently mislabeled the "crawl-walk-run" or "building block" approach to training. Both phrases fall short of the intent behind progressive training. For example, progressive training involves much more than first learning basic marksmanship, then learning basic movement techniques, and subsequently learning fire and movement at the team level. Rather, progressive training incorporates previously learned tasks and behaviors into subsequent training evolutions. This not only confirms retention but also sustains proficiency. One way to accomplish progressive training is by conducting tasks in various conditions. For example, movement techniques applied in open terrain may need to be adjusted in urban terrain. Training similar tasks across contexts allows units to execute tasks under increasingly more difficult and complex conditions.

Training Must Be Evaluated Against Desired Readiness Objectives

Training should increase METL proficiency and achieve individual and unit readiness objectives. Training schedules should reflect a progressive training plan carefully planned to meet METL proficiency and unit readiness objectives. Further, individual training events should be well-planned and briefed to ensure each participant understands its purpose and the desired end state for each Marine and for the unit. Participants should understand what is expected of them and how that relates to readiness objectives. During execution, leaders at all levels should critically and fairly evaluate their unit's performance against T&R standards. Leaders should also evaluate their own performance in leading and conducting the training and offer those observations to the Marines they are developing. Upon completion of a training evolution, leaders should conduct a debrief that highlights observed strengths and weaknesses in relation to the T&R standards and the constraints of commander's intent. This debrief should include an evaluation of how well the training achieved desired objectives. Post-event debriefs should be conducted at all levels, with emphasis on the individual and collective levels. As Marines learn best from their own experiences and through the shared experiences of others, leaders should allow their units and team members to be active participants in these debriefs. This also allows Marines to develop their voice and confidence as future leaders. Additionally, requiring Marines to reflect on their own experiences reinforces strengths and highlights opportunities for improvement while also allowing leaders to assess their Marines' level of understanding. The most important part of any training evolution is achieving the desired training objectives as determined through an honest and critical training evaluation.

USE OF TRAINING FUNDAMENTALS

The seven fundamentals discussed above are not all-inclusive, nor will they guarantee success. They should be used as guides to assess unit training programs on an ongoing basis. The key is that the officers, staff noncommissioned officers, and noncommissioned officers responsible for the training constantly use these principles to evaluate their overall training effort.

"You are either in contact, moving to contact, or training!"

—Colonel Paul R. "Chips" Catalogne, USMC¹

CHAPTER 2.

THE SYSTEMS APPROACH TO TRAINING AND EDUCATION

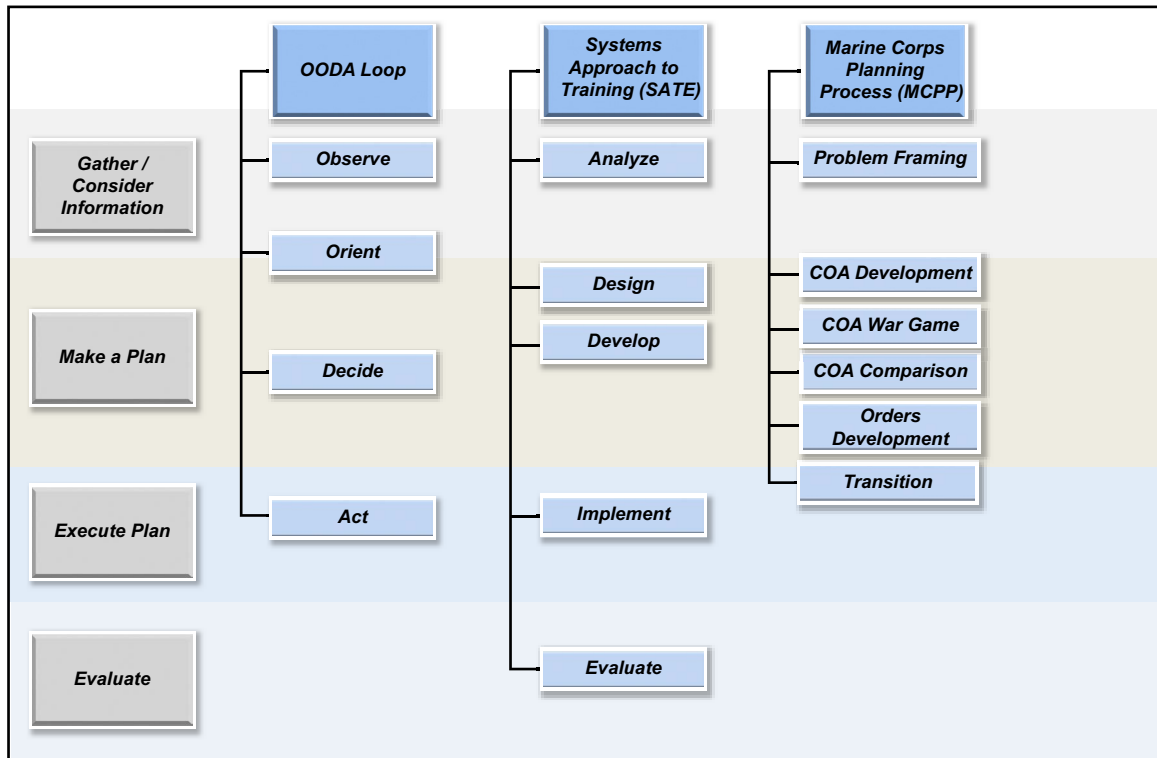
The goal of the SATE process is to improve unit operational proficiency, promote cohesion, and enhance unit readiness through effective and efficient training, education, and evaluation. Training is effective when it enables the unit to reach operational readiness goals based on T&R standards and is efficient when it makes the best use of resources. The SATE process empowers leaders to plan and execute unit training programs—from individual through collective and unit-level training—that produce and sustain the warfighters and combat readiness required to fight and win today and in the future. Further, the SATE process supports the ability to:

- Instill the warrior ethos and reflect Marine Corps ethics and core values.
- Sustain Marines' military occupational specialty (MOS) skills and enable them to function as part of the unit.
- Identify and establish training in those common skills integral to all Marines, regardless of rank or MOS, and ensure 'every Marine is a rifleman.'
- Provide progressive training that allows Marines to assume increasing responsibilities and increase their decision-making abilities.
- Plan and enable training to ensure the unit is able to function as an element of the Marine air-ground task force (MAGTF) in naval, joint, and multinational environments.
- Develop, execute, and assess a unit training program across the range of military operations in support of the MAGTF's readiness.

For more information on SATE, see Navy/Marine Corps Departmental Publication (NAVMC) 1553.1, *Marine Corps Instructional Systems Design/Systems Approach to Training and Education Handbook*.

PARALLEL PROCESSES

Marines familiar with the observe, orient, decide, and act (OODA) loop decision-making cycle and Marine Corps Planning Process (MCPP) will quickly understand how to apply SATE because the operational and training planning thought processes are similar. Figure 2-1 depicts the similarities and differences in the phases of the OODA loop, MCPP, and SATE process.



LEGEND
COA course of action

Figure 2-1. Decision-Making Phases.

Similar to the OODA loop and MCP, the first three SATE phases enable the commander and staff to arrive at and carry out decisions at each phase. While the steps within differ, the phases are similar in that they begin with gathering and analyzing information in order to make and execute a plan. The SATE process contains a unique fourth phase, evaluation, in which training is formally evaluated in support of beginning the process anew. Also similar to the OODA loop and MCP, the SATE process is characterized by flexible, adaptable, and dynamic thinking and application within evolving circumstances. As one example, the process is scalable and applies as well to creating large-scale training plans as small-scale training events. Leaders who understand SATE are better armed to create and execute effective training.

INTENT OF THE SYSTEMS APPROACH TO TRAINING AND EDUCATION

The SATE process provides a flexible, scalable, outcome-oriented, and systematic approach to aligning training and education plans with readiness requirements. It provides comprehensive guidelines, tools, and techniques needed to close the gap between current readiness and desired unit readiness objectives. The SATE process serves as a blueprint for organizing or structuring unit training.

The SATE process provides a systematic method to identify tasks the unit must perform and then progressively sequence tasks from individual to unit proficiency. This ensures Marines gain confidence in their individual abilities before integrating into progressively larger training evolutions. The SATE process additionally provides units with a transparent and repeatable method for identifying performance standards associated with their operational mission, and ensures Marines are evaluated on their ability to excel in combat. Finally, the SATE process provides an ongoing, non-linear approach to training that enables ongoing evaluations and leaders' ability to rapidly identify and act upon revisions necessary to improve the effectiveness and efficiency of the training program.

The SATE process applies to all aspects of unit training, from developing a unit training plan to planning a training event or exercise. The process is the same for each of these activities; however, the outputs are different. The unit training plan must precede events and exercises as it establishes the series of progressive individual and collective training events and unit exercises that enable the unit to increase its competence and proficiency. The difference between a training event and an exercise is the number of training audiences. Training events focus on a single training audience and MET while an exercise can have multiple METs and multiple training audiences. For example, the training audiences for a battalion field exercise are the headquarters, subordinate elements, and attachments. The headquarters' METs include: conducting command and control, logistics, and intelligence, while the subordinate elements could be conducting offensive and defensive operations. The SATE process is equally important in developing training across other MAGTF elements—examples can include preparing air units to conduct a casualty evacuation or preparing Marines to provide logistical support.

DEVELOPING A TRAINING STRATEGY

The SATE process is a continuous, cyclical process allowing any of its phases and associated functions to occur at any time. Each phase in the SATE model progressively builds upon the previous phase, providing a dynamic system of checks and balances to ensure the training is continuously evaluated and modified to correct deficiencies and satisfy identified and emerging operational requirements.

While SATE is a process, it is not meant to be prescriptive, and a rote checklist application is discouraged. The process presents a generalized approach that can be adapted to any training situation regardless of unit size. SATE is best leveraged as frame of reference or a way of thinking about training development and delivery. Leaders should continuously observe and make necessary and informed modifications to the training plan.

SYSTEMS APPROACH TO TRAINING AND EDUCATION PHASES

The SATE model simplifies and standardizes the training development process into manageable subsets. The SATE process contains five distinct phases, each serving a specific purpose: analyze, design, develop, implement, and evaluate. Each phase involves inputs, a process, and outputs. The successive phases of the SATE build upon the outcomes of the previous phase(s).

Analyze

The *analyze* phase includes a comprehensive assessment of the mission; higher headquarters METL; training, exercise, and evaluation plan; campaign plans; doctrine; and the unit's proficiency level to properly understand the training need. The METL provides focus for a unit's training program and is used to design, resource, and execute the unit's training plan. The outputs of the *analyze* phase include a restated purpose of the training document/event, a description of the training audience, descriptions of the strengths and weaknesses concerning unit readiness, and a detailed task list of all the METs and T&R events that must be included in the training plan/training event. The METL is the starting point of the *design* phase of the SATE process.

Design

The *design* phase includes clustering and sequencing individual-, collective-, and unit-level tasks to create a MET-based training continuum with logically ordered and progressively complex training objectives, activities, and events. The clustered and sequenced tasks form the skeleton of the training plan, training event, or exercise. The goal of this phase is to devise training that replicates as closely as possible the real-world wartime conditions to prepare Marines for the rigors of combat.

Develop

Building on the outcomes of the *analyze* phase and *design* phase, the *develop* phase is intended to finalize training planning and preparation. The phase includes identifying training enablers (e.g., ranges and simulators), methodologies, and evaluative strategies that most effectively and efficiently support achieving the training objectives.

Implement

The purpose of the *implement* phase is the effective and efficient delivery of training as part of the continual process of preparing the unit for combat. The *implement* phase includes preparation for and execution of the training plan, event, or exercise.

Evaluate

The purpose of the *evaluate* phase is to enable ongoing and cyclical improvement. It provides ongoing improvement in that evaluation is continual throughout all earlier phases of SATE, allowing real-time modification to training plans, events and exercises. It provides cyclical improvement in that, as the final SATE phase, it consists of formal evaluation. The final formal evaluation is both an evaluation of the unit and an evaluation of the effectiveness and efficiency of the training. The data output from the evaluate phase forms the foundation for analysis as the SATE process repeats itself.

determine and achieve combat readiness against a published standard. Commanders must understand their unit's METs to develop meaningful training. Commanding officers develop and publish METL-based training plans from T&R manuals within 30 days of assuming command.

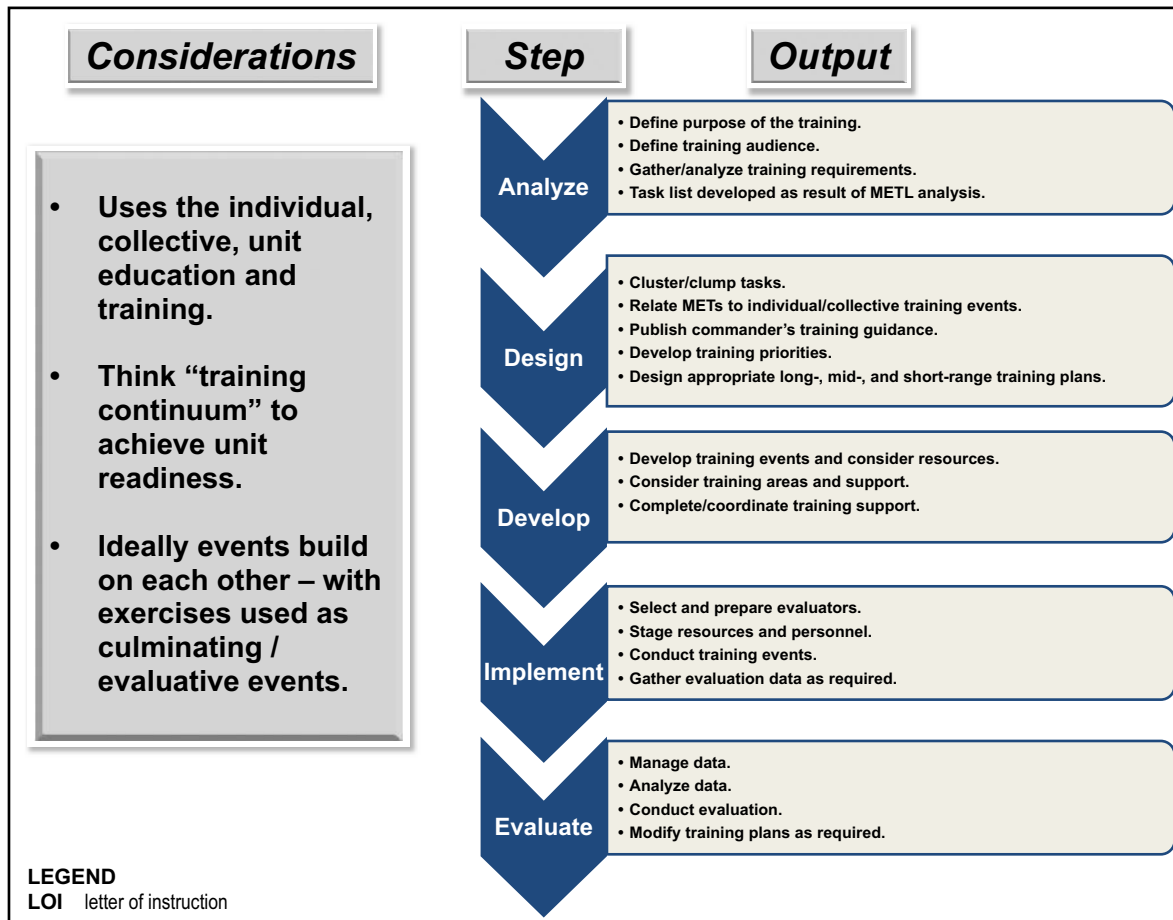


Figure 3-2. Systems Approach to Training and Education to Design a Training Plan.

Analyze

During the *analyze* phase, the commander conducts problem framing, reviews various training and mission inputs, and consolidates these into the METL. The METL provides the purpose to a unit training program and is used to design, resource, and execute the unit's training plan. The commander and key staff also conduct a unit training assessment with the unit as the training audience. The commander's training assessment compares the unit's current and desired proficiency levels. Subordinate leaders determine current proficiency levels by reviewing all available training evaluations and comparing them to the desired level of proficiency or associated performance standard. The analysis establishes who (audience/unit) is to be trained, why (the purpose) they are being trained, and what (the task list) training is to be conducted. A thorough analysis is the skeleton of the training plan.

Design

Using the approved METL, the commander and the principal staff begin the *design* phase to construct the unit training plans. The commander is responsible for developing a plan to achieve and maintain unit proficiency for all METs. Based on current readiness and each task within available training time and resources, the commander will prioritize training to achieve proficiency.

Commander's Training Guidance. Commander's guidance drives the planning process. The commander's guidance provides the basis for prioritizing training efforts and the direction needed for accomplishing the commander's training vision. The conduct of the training should be decentralized to empower subordinate leaders' concurrent training planning.

Training Plan Design. The commander, staff, and subordinate leaders design the unit training plan; this can be a multi-echelon plan. The unit commander's responsibility is to create a deliberate training plan that capitalizes on all available time and effectively tailors training to make it relevant to the unit's specific mission requirements in the context of the unit capabilities and limitations. Planning links the unit's METL with the subsequent execution and evaluation of training. A properly developed training plan will maintain a consistent combat focus; coordinate between associated command, ground, aviation, combat support, and combat service support organizations; address future proficiency; allocate resources efficiently; and account for lead times for training support requirements.

Develop

The *develop* phase is critical to successfully executing the training vision identified in the design phase. Failure to properly prepare for training can negate all efforts to this point in unit training planning. Coordination, both internally and externally, is critical. The phase includes developing all training materials, establishing logistical and support requirements, preparing training leaders and evaluators, conducting confirmation briefs, and modifying the training plan as needed.

Implement

The *implement* phase includes the execution of the training plan. Commanders and subordinate leaders stage the resources and personnel, conduct the planned training, and evaluate the training evolution. Training leaders and the Marines being trained should have a clear understanding of the training objectives and standards, the required tasks, and the conditions in which training will occur throughout this entire phase.

Evaluate

Training evaluation is integral to training management. Training and the training process must be continuously evaluated throughout all phases and by leaders at every level. Thorough evaluation allows the commander to determine the unit's combat proficiency, validate the effectiveness of the unit's training plan, and improve the training plan as required.

USING SYSTEMS APPROACH TO TRAINING AND EDUCATION TO DESIGN A TRAINING EVENT

A well-designed training plan includes multiple individual and collective training events, where each event progressively introduces more demanding and complex training scenarios and environments. Therefore, a training event is a single element within the unit's overall training plan. Using the SATE process to design a training event ensures each event provides the unit with the appropriate training resources in the proper time and place to achieve individual and collective T&R standards and training objectives, thereby satisfying part of the overarching unit training plan (see Figure 3-3).

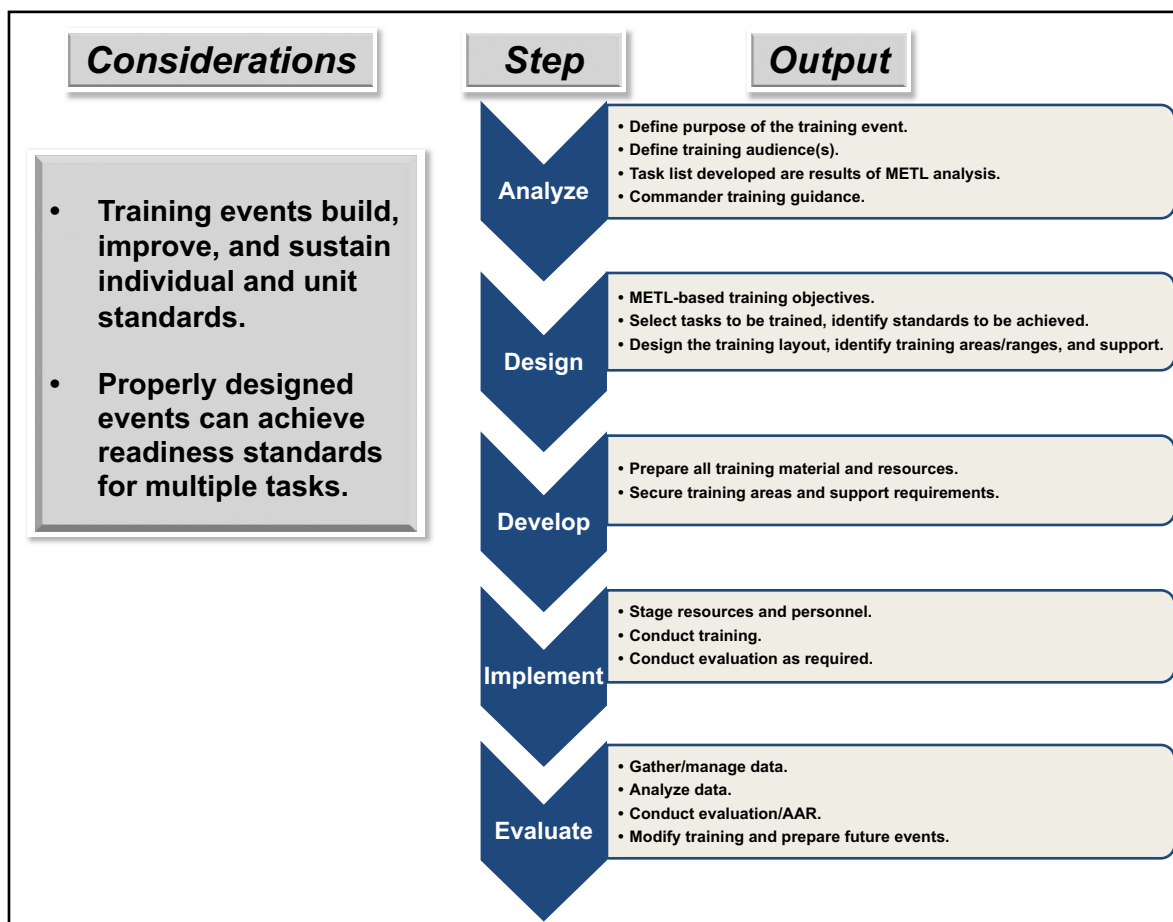


Figure 3-3. Systems Approach to Training and Education to Design a Training Event.

Analyze

The *analyze* phase consists of reviewing the training plan and conducting problem framing. The goal is to understand the outcomes and objectives of the training event, which includes a review of the primary and chained task(s), condition(s), and standard(s) to ensure a thorough understanding of training objectives and readiness requirements. The phase also consists of reviewing the training status of individual training participants and any subordinate units to ensure there are no

unsatisfied prerequisite training requirements. Individuals and subordinate units that have not satisfied prerequisite requirements will likely fail, which will dampen their enthusiasm to learn and subsequently detract from the effectiveness of the training event.

Design

The purpose of the *design* phase is to sequence tasks from individual to collective events, ensuring training is progressively more challenging and realistic. During the design phase, tasks are grouped and organized in a manner that builds Marines' ability to excel in combat.

Develop

The *develop* phase includes finalization of training and evaluation methods. This includes identifying available training enablers and resources, such as simulators and ranges. Training simulators allow a unit to conduct multiple sets and repetitions on difficult and critical tasks when available. Other considerations include immersive training enablers and selecting training areas and ranges necessary to conduct the training event.

Implement

The *implement* phase is the execution of the training event. Prior to the conduct of training, leaders brief trainees on the purpose and intended outcomes of the training event. Commanders and subordinate leaders stage the resources and personnel, conduct planned training, and evaluate the training evolution.

Evaluate

Evaluation is both a formal phase and a continuous activity throughout the entire process. The purpose of the *evaluate* phase is to formally review unit performance against Marine Corps standards to determine whether a unit is ready for combat. Thorough formal evaluation is critical to the unit training process; it supports a commander's ability to determine the unit's proficiency in the essential tasks (against the METs) and validate the effectiveness of the unit's training plan. A unit is trained when it has successfully achieved training to standard against essential tasks. Formal and thorough evaluations are essential to determining whether a unit is trained to standard—and therefore ready for sustainment training through more complex training—or in need of remediation.

The design and develop phases must include considerations for effective evaluation. Effective and efficient evaluation must be thoroughly planned rather than haphazardly developed upon completion of training. The best evaluations capture relevant actions and decisions made by the training audience as part of an after-action review or debrief. This requires designing and developing a comprehensive data capture plan that details the specific actions to be evaluated, when the action occurs within training, and how the relevant information will be captured for evaluation. It also includes identifying and securing resources, such as observers or instrumentation, needed to capture performance data that supports effective evaluation.

APPLYING SYSTEMS APPROACH TO TRAINING AND EDUCATION TO EXERCISE DESIGN

Exercises are training events with multiple, simultaneous training audiences. They are typically held at the battalion/squadron echelon and above once all participants have satisfied prerequisite individual and collective training. While the complexity of an exercise depends on mission and unit size, the SATE process is a useful guide to planning any exercise (see Figure 3-4).

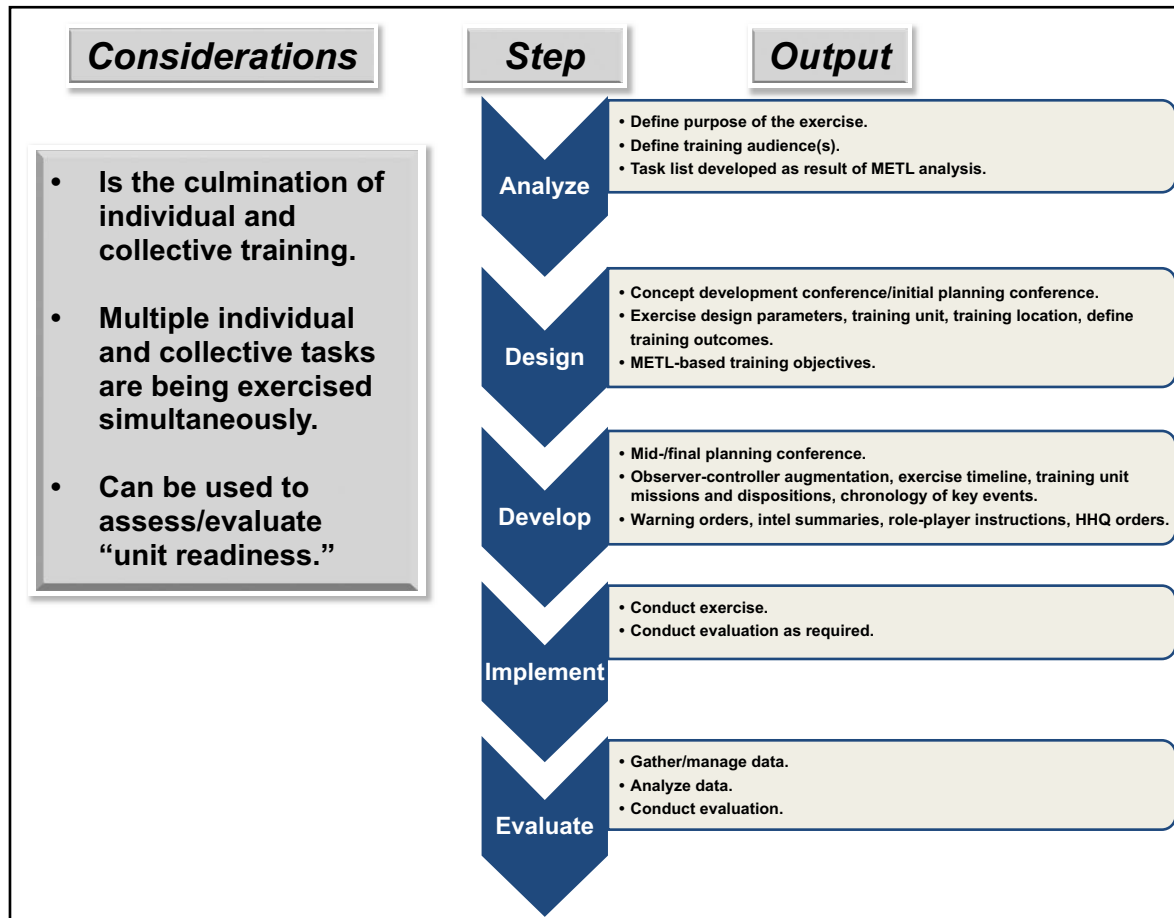


Figure 3-4. Systems Approach to Training and Education to Exercise Design.

Analyze

The *analyze* phase consists of conducting problem framing analysis to identify and select appropriate METs from the unit METL, identify necessary organizations, determine and select relevant conditions and standards, and identify chained and linked tasks. Collectively these components form the “who” and the “what” of the exercise.

Design

The purpose of the *design* phase is to produce an exercise outline. The phase includes a concept development conference followed by an initial planning conference. During the concept development conference, participants consider the commander’s guidance and identify training

objectives, training events, milestones, and expenses. During the initial planning conference, participants formulate a scenario with a series of associated story lines that will stimulate the training audiences to satisfy the training objectives.

Develop

The *develop* phase includes a mid and final planning conference. The overarching objectives of these conferences are to develop and validate each training audience's METs and training objectives and to design the exercise event schedule. The objective of the mid planning conference is to tie together all chained and linked events of the training audiences. The objective of the final planning conference is to refine and synchronize the exercise scenario to ensure the exercise flow is transparent to exercise participants.

Implement

The purpose of this phase is to provide training to the exercise participants, and evaluate the training audiences' event performance relative to the training objectives.

Evaluate

The purpose of the *evaluate* phase is to determine which organizations within the command perform to training standards. The evaluation is the commander's responsibility. While the commander is always evaluating the unit, this phase allows the commander to make a formal evaluation of readiness proficiency. The aim is to answer two questions: "Has the training been effective?" and "Is the command capable of meeting the required performance standards for its assigned mission?"

CHAPTER 4.

EVALUATE TRAINING

INSTITUTIONALIZING EVALUATION

Evaluation is not the finish line of training; it must be the fuel to inform future training. Evaluation is a continual process that occurs at all echelons and during every training phase. It enables continuous and ongoing improvement to training at any point, not solely upon completion of the event. The commander holds overall responsibility for the evaluation and must ensure the unit can meet readiness standards outlined in the T&R manual.

Evaluations help determine if the training plan and the training are enabling the unit to satisfy readiness goals. An evaluation measures the efficiency and effectiveness of the training. Training effectiveness is determined by how well Marines meet or exceed established training standards. Training efficiency is determined by how well the training leader used available resources (e.g., ammunition, time, funds, personnel, facilities, equipment) to train Marines. Evaluation results can indicate that additional training is necessary or that the training program needs revision.

INFORMAL AND FORMAL EVALUATIONS

Informal Evaluations

Units typically conduct internal, informal evaluations. There are three techniques for internal evaluations: post-training checks, sampling, and on-the-job observations.

Post-Training Checks. Post-training checks are evaluations of training effectiveness conducted at varying intervals after training. For the best results, the post-training check is the last part of the training session where time and resources permit. This provides immediate feedback on the training effectiveness, and it immediately identifies any need to conduct remedial training to resolve deficiencies. If post-training checks must be conducted separately, they are conducted as soon after the training as possible. Lastly, post-training checks determine whether there is a need for sustainment training.

Sampling. Sampling determines whether Marines and units can still perform specific tasks to standard. Leaders use performance evaluations, similar to a post-training check, to randomly evaluate individual Marines or a portion of the unit. The sampling technique is applicable to either individual or unit tasks. It provides the evaluator with an idea of the individual's or the unit's proficiency level on a specific task.

Evaluators sample individual or unit performance as it exists at the time; they do not provide advanced sustainment training. The intent is to determine the individual's or unit's level of

proficiency without additional training. Marines are given just enough notice of the sampling so they have time to report to the evaluation site. They should not be notified too far in advance. They should not be given enough time to study or practice before hand. For example, an evaluator can simply walk up to a Marine and say, “show me how to place a Claymore mine.” Then the evaluator gives the Marine the action to be performed, conditions, and performance standards. The result will indicate the Marine’s actual level of proficiency.

Evaluator proficiency is essential since the evaluator must observe a Marine’s actions, decide whether the Marine met the standard, and constructively critique the Marine’s performance. Therefore, evaluators may also need sustainment training if they have not performed the task for some time. They should base their evaluations on their proven abilities and recent experiences in accomplishing the same task.

An effective sampling includes the evaluation of more than one Marine, crew, squad, or platoon. Ten percent of the unit’s personnel strength is an adequate sampling and provides a good indicator of the unit’s proficiency level. Evaluators should not sample too many tasks at once but concentrate on specific areas at a time.

On-The-Job Observations. Many Marines, particularly those in support or aviation units, regularly perform their combat missions during their daily performance on the job. Therefore, leaders can conduct performance evaluations simply by watching Marines perform their daily tasks. Leaders then compare the results of the Marines’ work to the standards.

Formal Evaluations

Higher headquarters orchestrates formal evaluations. The chain of command organizes standards-based evaluations at regular intervals. This allows leaders to evaluate how well Marines and units can perform their missions. They observe their Marines during the evaluations and review the results to decide whether their Marines are proficient or need more practice. These evaluations include:

- Individual or collective MOS skills: These include 1000/2000 level T&R events (individual) or 3000 level and above events (collective), which test Marines on selected individual and collective events.
- MCCRE evaluations: Higher headquarters conducts a MCCRE to determine subordinate units’ ability to perform selected tasks.

Leaders must use evaluation results to determine the strengths and weaknesses of the Marines and subordinate units. During training meetings, the leaders recommend future training based on this information.

EVALUATORS

To evaluate training effectively, evaluators must—

- Establish/follow procedures for evaluating individual and unit performance.
- Determine the standards they evaluate.

- Understand their critique and after-action report responsibilities.
- Know who is in charge of the evaluation team, who is on the team, and what the individual evaluation taskings are.

Evaluators must also—

- Be proficient in the tasks or missions to be evaluated.
- Be equal or senior in rank and position to the leaders being evaluated (when absent specific qualification/designation structure). Unit commanders should evaluate like unit commanders; company and platoon commanders should evaluate sister unit platoon commanders. Squadron commanders should evaluate similar type/model/series flying unit commanders.
- Be familiar with the tactical and field standing operating procedures for the units being evaluated.
- Minimize impacts to the training unit by ensuring their presence does not impede the event performance.
- Know how to use sampling techniques.
- Know how to conduct a debrief.

To evaluate effectively, evaluators require training and the necessary resources. Training evaluation is usually conducted by the chief evaluator together with the commander responsible for the training. Additional guidance for evaluators may also be appropriate and should be issued by the commander or the commander's representative prior to the start of the evaluation.

EVALUATE TRAINING RESULTS

The training manager and the training leader work together to evaluate the training results as soon as possible after the completion of the activity. Initial training evaluation results come from testing the performance of individuals and units. No other indicator is as important as the initial training evaluation. This evaluation should closely align to the purpose and quality of the outcome of one or more T&R events. It should reflect how it contributes to a specific, related MET as well as the level of proficiency demonstrated. Performance strengths and weaknesses should be evaluated against identified standards within the context of given training conditions, and problems, trends, or areas of failure must be identified against a performance evaluation checklist, or grading scale. Evaluators should consolidate solutions-oriented recommendations to resolve these challenges.

The most challenging part of the evaluation phase is correctly identifying the cause of a training problem. The training evaluation report and feedback from Marines provide information on the possible causes of the training problems. Failure during performance is usually attributed to one of the following factors:

- Individual failure.
- Unit failure.
- Trainer failure.
- Training program failure.

Individual Failure

One possible cause for failure is the Marine's inability to perform specific tasks required to accomplish the objective. The Marine may have a skill deficiency or may have misunderstood the directions.

Another possible cause for failure is a lack of motivation. Some Marines do not pay attention, fall asleep during those activities or events, allow personal problems to interfere with their progress, or do not have the proper attitude to receive training. For example, the Marine who failed rifle requalification may have missed the instruction of placing the proper windage or elevation on the weapon and, as a result, never fully understood the procedure.

Unit Failure

Lack of unit coordination may lead to deficient performance and failure. If an aviation crash crew cannot work smoothly to rescue the pilot, they need further training as a team. Team failure can also result from the deficient performance of an individual on the team. If the driver of a crash vehicle does not choose the correct firefighting agent, the pilot rescue may not be successful.

A lack of leadership may also result in unit failure. The team will not perform to standard if the team leader cannot make decisions quickly and communicate decisions clearly.

Trainer Failure

If the training leader does not know enough about the subject matter to teach it, the lack of knowledge could cause performance failure. This frequently occurs during a shortage of qualified personnel or if one training leader has to fill in for another training leader without enough time to prepare. If the training leader does not know enough to teach the subject, Marines will not successfully complete the training.

Some training leaders are very qualified in the subject matter but cannot communicate their ideas very well. They may be unable to instruct; effective instructors know there is more to the art of teaching than simply relaying information.

At times, training leaders may also lack motivation due to personal problems, uncertainty about duty requirements, or a lack of care for the assigned duty. The training leader's lack of motivation can seriously impair training for the Marines and the unit.

Finally, the training leader must know how to use the training materials. The training leader must devote adequate time to studying the materials so the activity progresses smoothly.

Training Program Failure

Marines may fail because they did not receive adequate training. Deficient training and inadequate or poor training materials are common causes of training failure. Marines cannot be expected to pass performance tests if important information is omitted or inaccurate. To determine whether a training program failure exists, training leaders must ask the following questions:

- How was the instruction given?
- Was the evaluation conducted properly?
- Were all of the resources available when required?
- Were all instructional personnel present and in sufficient numbers?
- Was the test conducted in a reasonable time after the instruction was presented?

Reaping Success From Failure

A properly conducted evaluation should provide the training leader with the necessary information to make changes in training that will improve its effectiveness for the Marines and the unit. The importance of honesty and properly evaluating all aspects of the training effort by asking the above questions benefits all participants and ensures that we use our limited training resources wisely.

CONCLUSION

Training is a skillful blend of art and science. Leaders turn training failures into learning opportunities. Everything a leader does with a unit is a learning opportunity. While training should attempt to approximate the conditions of battle, leaders must realize it can never fully duplicate the level of friction of actual combat. Regardless, leaders train their units to bring out fortitude, perseverance, boldness, *esprit de corps*, and other traits not explained by art or science that are essential during conflict.

Because uncertainty can never be eliminated, Marines must learn to fight effectively despite it. Leaders foster operational effectiveness by developing simple and flexible plans, planning for likely contingencies, developing standing operating procedures, and fostering initiative among subordinates.

The occurrences of training will not unfold like clockwork. Leaders cannot hope to impose precise, positive control over training events. The best a leader can hope for is to impose a general framework of order on the disorder, to influence the general flow of action rather than try to control each event. Commanders and leaders at all levels set conditions for training that allow their Marines and units to improve capabilities and capacities for understanding the operational environment, making decisions, and taking action to accomplish the mission.

Leaders make training progressively more challenging and complex, from individual to unit. Every training event is a learning opportunity. An exercise is not the monolithic execution of a single tactical task by a single entity but necessarily involves near-countless independent but interrelated tasks and actions simultaneously executed throughout the organization. Efforts to fully centralize an exercise and to focus exclusively on a single command entity are inconsistent with warfare's intrinsically complex and distributed nature.

Training must continue to evolve based on growing experience, advancements in unit proficiency, and the changing face of warfare itself. Never stop training.

"We must remember that one man is much the same as another, and that he is best who is trained in the severest school."

—Thucydides²

APPENDIX A.

BASICS OF TRAINING

The Marine Corps must train continuously to develop and maintain combat-ready Marines and units that can perform assigned tasks to specific standards. Training builds self-confidence, promotes teamwork and *esprit de corps*, and develops professionalism and leadership.

Training fundamentals apply at every echelon of command. The fundamentals applied to the Marine expeditionary force commander practicing tactical command and control with the major subordinate commanders in a command post exercise apply just as well to the squad leader training Marines to conduct patrolling operations. Training molds individuals into units capable of performing their combat tasks and missions. Training is effective only if it produces technically and tactically proficient Marines and leaders to form cohesive units capable of accomplishing their assigned missions.

CHARACTERISTICS

To plan, conduct, and evaluate training, leaders must understand the characteristics of training. Good training is standards-based, well-structured, efficient, effective, and realistic. It prepares the Marine and units to perform tasks in support of combat missions.

Standards-Based

Information provided by the training leader and practiced by the Marine must comply with current Marine Corps doctrine and be technically correct. Procedures for equipment operation and safety are correctly presented and faithfully practiced. Adherence to standards saves lives, reduces equipment failures, and builds confidence.

Structure

All training is connected and should never be conducted in a vacuum. For example, platoon-level training should be structured to ensure accomplishment of squad training objectives. Similarly, unit training programs should contain a suitable mix of tasks or missions needing initial and sustainment training. Sustainment training on critical tasks or missions that the unit can already perform will keep skills already learned from becoming future weaknesses. Advanced tasks, missions, or conditions are added as appropriate to perfect the level of individual competence and unit proficiency.

Efficiency

Time is often the limiting factor in unit training. Leaders should look to buy training time at every opportunity. Subordinate leaders must view every higher-level training event or exercise as an opportunity to accomplish their own unit's training objectives.

Effectiveness

Training fosters unit cohesion and builds individual and team proficiency in tasks required for success in combat. Ineffective training must be immediately stopped and modified to achieve Service standards. Whenever they conduct training, leaders must encourage and develop teamwork among subordinates. In this way, Marines gain confidence in themselves and other unit members, building cohesive teams. Training develops leaders by providing opportunities to practice their military skills, learn from their mistakes, and gain confidence in their leadership abilities. Critiques, after-action reports, and evaluations allow commanders to address the effectiveness of training. Leaders should recognize that mistakes will occur and use the experience gained from those mistakes to improve the effectiveness of their training.

Realism

Units must train the way they expect to fight. Leaders prepare realistic scenarios, based on enemy doctrine that enables their units to train under simulated combat conditions. Good tools to create realism are force-on-force equipment and role players to act as opposing forces. Units that will fight or that are in support of a combined arms team must train as members of that team. Training must be conducted with all the support units and equipment required for war. Command and control, administrative, supply, maintenance, and other routine support activities should be regularly executed in the field. The unit is trained when it can live and operate with ease in the operational field environment. The degree of training realism will vary with the Marines' level of training proficiency. Too much realism early in training can waste time and resources if Marines have not mastered basic skills. Once Marines have learned the basics, leaders can add realism as quickly as Marines can profit from it. Realistic training develops Marine endurance, coordination, and determination. Such training reinforces unit discipline and provides opportunities to exercise personal initiative as training conditions change. By training realistically, unit members build physical and mental resilience.

Safety

Safety must be planned into all training through risk assessments. Although all training must be challenging and realistic, it should never be at the expense of the physical well-being of our Marines. A well-disciplined, trained unit executing a thoroughly prepared training plan is normally accident free. Every leader and Marine must be aware of safety policies and restrictions and be empowered to stop unsafe training. Marine Corps Order (MCO) 5100.29C, *Marine Corps Safety Management System (Volume 2)*, establishes Marine Corps safety policies and risk management procedures.

GLOSSARY

Section I. Abbreviations and Acronyms

FMF	Fleet Marine Forces
KSA	knowledge, skills, and attitudes
MAGTF	Marine air-ground task force
MCB.....	Marine Corps base
MCDP	Marine Corps doctrinal publication
MCO	Marine Corps order
MCRP	Marine Corps reference publication
MCTP.....	Marine Corps tactical publication
MET	mission-essential task
METL.....	mission-essential task list
MOS.....	military occupation specialty
NAVMC.....	Navy/Marine Corps departmental publication
OODA.....	observe, orient, decide, act
T&R	training and readiness

The following acronyms pertain to processes and entities specific to this publication series.

MCCRE	Marine Corps Combat Readiness Evaluation
SATE	Systems Approach to Training and Education

GLOSSARY

Section II. Terms and Definitions

exercise

A military maneuver or simulated wartime operation involving planning, preparation, and execution that is carried out for the purpose of training and evaluation. (DOD Dictionary)

mission-essential task

A task, selected by a force commander from the Marine Corps Task List, deemed essential to mission accomplishment. Also called **MET**. (USMC Dictionary)

mission-essential task list

The list of a command's essential tasks with appropriate conditions and performance standards to assure successful mission accomplishment. Also called **METL**. (USMC Dictionary)

training task

A direct training activity that pertains to an individual Marine or, at a collective level, to a specific unit. A task is composed of three major components: a description of what is to be done, a condition, and a standard. (USMC Dictionary)

Section III. Common Training Terms

Note: The following terms and associated descriptions, though not in the Service Dictionaries, are provided to ensure a common understanding and are applicable to this publication series.

education

A process of systematically learning to facilitate acquiring and enhancing knowledge, skills, and understanding to enable decision making.

evaluation

The measurement of competence of individual and/or collective mission-essential tasks based on required conditions and standards. A continuous process that occurs at all echelons, during every phase of training, and can be either formal or informal.

exercise design

Exercise design incorporates multiple individual and collective tasks that are simultaneously conducted. The objective of exercise design is to structure a training event that establishes the conditions to facilitate performance-oriented training on properly selected, directed, and mission-essential tasks.

field exercise

A type of exercise conducted under simulated war conditions in which troops and armament of one side are actually present, while those of the other side may be imaginary or in outline.

home station training

Training planned and conducted by Marine Corps units aboard their home station (or base) to improve combat readiness. Also called **HST**.

Marine Corps Combat Readiness Evaluation

A formal unit evaluation based on approved Marine Corps training and readiness tasks, conditions, and standards derived from core and/or assigned mission-essential tasks to ensure standardization and combat readiness in preparation for operational deployments. Also called **MCCRE**. For more information on conducting, evaluating, and reporting on a MCCRE, see MCO 3501.1E.

Service-level training exercise

A type of exercise to provide units with premier training venues and Service resources to meet the standards outlined in collective mission-essential tasks and training and readiness events. The unit-based training portion can include: integrated training exercise, adversary force exercise, mountain exercise, Marine air-ground task force warfighting exercise, and Marine expeditionary force and Marine expeditionary brigade field exercises. Also called **SLTE**. See MCO 3500.11G, *Service-Level Training Exercise Program (SLTE-P)*.

Systems Approach to Training and Education

An orderly process for analyzing, designing, developing, implementing, and evaluating an instructional program that ensures personnel acquire the knowledge and skills essential for successful job performance. Also called **SATE**. For more information, see NAVMC 1553.1A.

training

Learning and applied exercises to facilitate attainment and retention of skills, knowledge, and attitudes required to accomplish military tasks.

training and readiness standard

A measure of collective or individual performance. As a minimum, both collective and individual training standards consist of a task, the condition under which the task is to be performed, and the evaluation criteria which will be used to verify that the task has been performed to a satisfactory level.

training design

A detailed plan for a training event or exercise that details for what you will do, why you will be doing it, and the best ways to reach your training objectives. Training design incorporates individual, collective, and unit training into a training continuum to achieve unit readiness.

training event

A training event focuses on building, improving, or sustaining individual and/or collective tasks at lower echelon levels.

training exercise

a type of exercise intended as culminating collective training events that critically assess unit-training status.

training support center

Training support centers provide local training support to assist units with designing training plans, exercise plans, training events, and leveraging training enablers to aid unit commanders in meeting training readiness requirements. Also called **TSC**. Training and Education Command training support centers are located at Camp Lejeune, North Carolina; Camp Pendleton, California; Marine Corps Air Ground Combat Center Twentynine Palms, California; Marine Corps Base (MCB) Hawaii; MCB Japan (Okinawa); and MCB Quantico, Virginia.

REFERENCES AND RELATED PUBLICATIONS

Joint Issuances

DOD Dictionary of Military and Associated Terms

Other Instructions

Navy/Marine Corps Departmental Publications (NAVMCs)

1553.1_ Marine Corps Instructional Systems Design/Systems Approach to Training and Education Handbook

Marine Corps Publications

Marine Corps Supplement to the DOD Dictionary of Military and Associated Terms

Marine Corps Doctrinal Publications (MCDPs)

1 Warfighting

7 Learning

Marine Corps Reference Publications (MCRPs)

7-20A.1 Training Plan Design

7-20A.2 Event and Exercise Design

7-20A.3 Marine Corps Simulations Training Guide

7-20A.4 Evaluations and Assessments

7-20A.5 Training Data Management

Marine Corps Orders (MCOs)

3501.1_ Marine Corps Combat Readiness Evaluation (MCCRE)

3500.11G Service-Level Training Exercise Program (SLTE-P)

5100.29_ Marine Corps Safety Management System

NOTES

1. Attributed to LtCol. “Chips” Catalone by LtGen Paul K. Van Riper
2. Thucydides, *The History of the Peloponnesian War*

A non-cost copy of this document is available at:

<https://www.marines.mil/News/Publications/MCPEL/>

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