NAVMC 1553.2
C 466
21 Sep 2015

NAVMC 1553.2

From:  Commandant of the Marine Corps
To:    Distribution List

Subj:  MARINE CORPS FORMAL SCHOOL MANAGEMENT POLICY GUIDANCE

Ref:   (a) MCO 1553.2_
       (b) MCO 1553.4B
       (c) NAVMC 1553.1_
       (d) MCO P3500.72A
       (e) NAVMC 3500.14C
       (f) CJCSI 1800.01D w/ Ch 1
       (g) CJCSI 1805.01A
       (h) MCO 1500.56
       (i) MCRP 6-11D
       (j) MCRP6-11B
       (k) MCO 1200.18
       (l) Title 10
       (m) DoDI 1402.06
       (n) Memorandum, Implementation of Updated Conference Oversight
           Requirements, 6 Nov 2013
       (o) SECNAV M-5510.30
       (p) TECOMO 5041.1
       (q) MCO 1580.7D
       (r) MARADMIN 178/10
       (s) MCO 1553.10
       (t) SECNAVINST 5211.5E
       (u) DoDI 1000.30
       (v) MARADMIN 698/12
       (w) MCO 3500.27C
       (x) MCO 5100.29B
       (y) NAVMC 5100.8
       (z) MCO P5102.1B w/Ch 1
       (aa) OPNAVINST 1500.75C
       (bb) MCO 3504.2A
       (cc) MCO 5100.19F

Encl:  (1) Marine Corps Formal School Management Policy Guidance

1.  <u>Purpose</u>.  To promulgate the requirements and establish procedures to implement reference (a).

2.  <u>Scope</u>.  The scope is based on best practices, changes to referenced doctrine, and the community of practice within Marine Corps Formal Schools. Per reference (a), Formal Schools are defined as institutions that develop and/or present programs of instruction or curricula approved by the appropriate General/Flag officer to meet specified training and education requirements.  Specific guidance for staffing and approval of curricula, staff and faculty development, and evaluation for EDCOM Formal Schools can be

found in reference (b), the MCU Academic Regulations, and the MCU Faculty Handbook. These documents can be downloaded from the MCU website: https://www.mcu.usmc.mil/SitePages/administration/MCU%20Command%20Policy.aspx

3. <u>Changes</u>. Ref (a) provided overarching policy for the management of Marine Corps Formal Schools and Training Detachments. Enclosure (1) of that Order contained Formal Schools management procedural guidance which provided necessary information for Formal Schools to ensure compliance with the established policy and doctrine. This NAVMC includes pertinent information from MCO 1553.2B, Enclosures (1) thru (4) and Appendices A-S.

4. <u>Information</u>. Commanding General Training and Education Command (CG TECOM) will update this directive as necessary to provide current and relevant procedures to Commanding Officers (CO), Officers-In-Charge (OIC), and Directors to ensure current best practices are available for use by Marine Corps Formal Schools. All questions pertaining to this directive should be directed to: Commanding General, TECOM (MAGTF Training & Education Standards Division, C 466), 1019 Elliot Road, Quantico, VA 22134. Upon revision of the references, this policy will be updated to reflect the changes.

5. <u>Command</u>. This directive is applicable to the Marine Corps Total Force.

6. <u>Certification</u>. Reviewed and approved this date.

J. W. LUKEMAN
By direction

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CHAPTER 1

MARINE CORPS INSTRUCTION

1.  Background.  To meet the learning requirements of the contemporary and
future operating environment, a balanced integration of training and
education across the continuum is necessary.  Formal Schools must achieve
this balance to meet the training and education requirements through
standards based and outcome driven instruction that is guided by this
directive and references (a) and (c).

2.  Basis of Marine Corps Formal Instruction.  CG TECOM executes the
responsibility to establish Training and Readiness (T&R) policy and maintain
T&R Manuals through MAGTF Training and Education Standards Division (MTESD)
and in accordance with references (d) and (e).  MTESD assigns a Task Analyst
(TA) to manage each Occupational Field (OccFld) and serve as the Subject
Matter Expert (SME) on TECOM programs, policies, and procedures.

    a.  Individual Training Events (ITE)

        (1) The Marine Corps T&R Programs require the establishment of ITEs
that are based on specific requirements and performance standards to ensure a
common base of training and depth of combat capability; ITEs describe a
standard of competence to be achieved.  ITEs are established per references
(d) and (e) and published in Marine Corps T&R Manuals in the NAVMC 3500
series.

        (2) ITEs form the foundation from which Formal Schools develop new or
revised Programs of Instruction (POI).  POIs identify the requirements upon
which to base the curriculum of a course, the resources needed to conduct the
course, and any resource shortfalls that necessitate the acquisition of new
systems, equipment, or devices.

        (3) Approved and published ITEs that are designated for instruction
become the foundation for the development or revision of a formal course.
ITEs are designated as entry-level or post entry-level training.  Entry-level
and Military Occupational Specialty (MOS) producing schools instruct entry-
level individual events (1000 level).  Those ITEs not designated for entry-
level instruction may be included in skills-progression or non-MOS PME
courses, or in unit MOJT programs (2000 level).  ITEs can also be instructed
using Distance Learning (DL) courses and formal and blended learning formats
developed by various agencies, such as the College of Distance Education and
Training (CDET), Navy Knowledge Online (NKO), Defense Knowledge Online (DKO),
Army Knowledge Online (AKO), and Joint Knowledge Online (JKO).

    b.  Joint Learning Objectives (JLO).  References (b), (f), and (g)
provide guidance to military training and education institutions regarding
Joint Learning Areas (JLA) and Joint Learning Objectives (JLO) in order to
achieve the goal of expanding "jointness" to all appropriate levels of the US
Armed Forces.  Marine SMEs represent the Marine Corps' interest at joint
formal schools to ensure joint learning requirements are met.  Gaps in joint
training are identified by SMEs and instruction is developed to meet these
gapped learning requirements.

    c.  Values Based Training and Leadership (VBT/L).  VBT/L are learning
requirements directed by CMC and will be integrated in all POIs as

appropriate for the Target Population Description (TPD).  VBT is the
reinforcement and sustainment of the values subjects introduced in recruit
training.  Those values subjects also have a corresponding annual training
requirement for all Marines as identified in MCBUL 1500.  VBL is recognizing
the inherent responsibility of leaders at all levels in reinforcing VBT.  CG
TECOM has determined that in order to satisfy the CMC requirement for VBT/L,
the baseline means of delivering instruction is by facilitating a guided
discussion.  It is understood that there are other ways this can be
accomplished; however, leaders are expected to deliver VBT/L instruction in
this manner, at a minimum, across the Training and Education continuum.
VBT/L will be interwoven into every POI wherever possible; not taught as a
separate block of instruction unless a determination was made to do so.
NOTE:  For MOS producing schools where a student may return to the school for
multiple skill or career progression courses, VBL will only be required in
the lowest level career progression course (e.g. NCO level courses).
Amplifying information can be found in references (h) thru (j).
Implementation will involve three distinct phases:

        (1) <u>Initial Entry Training (Phase I)</u>.  Every Marine, enlisted and
officer, will be formally instructed in Marine Corps Values during entry
level training.  The preponderance of the learning will occur at the Marine
Corps Recruit Depots for enlisted Marines and at Officer Candidates School
(OCS) and the United States Naval Academy for officers.

        (2) <u>Reinforcement Education (Phase II)</u>.  The lessons of Phase I will
be reinforced in Marine Combat Training (MCT) at the School of Infantry (SOI)
for all enlisted Marines and at The Basic School (TBS) for officers as well
as MOS schools for all Marines.  Marine Corps Core Values based training and
education will continue at every Professional Military Education (PME) school
which a Marine attends from the Lance Corporal Seminar (lowest level) through
the Marine Corps War College (highest level).  Additionally, gatherings of
Marine leaders, such as the General Officers Symposium, Commanders' Call, and
Sergeants Major Symposium will include discussions concerning values.

        (3) <u>Sustainment Education (Phase III)</u>.  Phase III will occur on-the-
job and will be facilitated by leaders at all levels throughout the Marine
Corps.  It will involve not only formal presentation of course material, but
will encompass awareness of the importance that practicing Marine Corps Core
Values has in each Marine's day-to-day life.  Sustainment is the key to the
success of the Marine Corps Values Program.

3. <u>Execution of Marine Corps Formal Instruction</u>.  For training and education
to be effective, the areas of influence and areas of interest must be
understood.  This understanding is required because training and education
efforts tend to overlap between deep and close operations.  In addition,
faculty professional development is the product of a learning continuum that
comprises training, experience, education, and self-improvement to produce
the most professionally competent (strategic-minded, critical-thinking)
individual possible.  In Marine Corps Formal Schools, ITEs, JLOs, and VBT/L
serve as a foundation upon which to develop more specific learning goals.
These goals are referred to as Learning Objectives and Learning Outcomes,
which enable Formal Schools to conduct systematic curricular analysis and
efficient program evaluation.  Amplifying information can be found in
reference (b).

    a.  <u>Learning Objectives (LO)</u>.  An LO is defined as 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. ITEs that are included in a formal course of instruction will have corresponding Terminal and Enabling Learning Objectives (TLO/ELO) unless exempted by the specialized cases identified below. 1000-level MOS producing courses shall have a minimum of two ELOs to demonstrate the doctrinally based building blocks for instruction. All TLOs and ELOs shall be taught and evaluated in a learning environment. TLOs will not be repeated as ELOs since this is contrary to a logical learning analysis. The students are essentially "reinforcing" previously learned skills. In these cases specific justification will be required as part of the CO's Cover Letter if there are no associated ELOs with a TLO. There are, however, specialized cases where a TLO can stand on its own.

       (1) <u>Example 1</u>: If a TLO and its associated ELOs have been instructed and evaluated to standard, but are subsequently used in the same POI to reinforce previous instruction, such as would take place in a practical or field training exercise, then those TLOs do not need to reflect associated ELOs. A justification will be required to be added in the Concept Card notes explaining the rationale.

       (2) <u>Example 2</u>: If a student attends a subsequent course of instruction where some of the T&R events (e.g. TLOs, ELOs) are a review of previously learned standards (not out of sustainment), then those TLOs do not need to reflect associated ELOs. A justification will be required to be added in the Concept Card notes explaining the rationale.

       (3) <u>Example 3</u>: If specific skill or career progression courses that focus on 2000 level ITEs where the TPD has MOS experience, then these courses may contain review material designed to establish a common baseline as the starting point for the course and since these skills are already expected to be exhibited by the students, then those TLOs do not need to reflect associated ELOs. A justification will be required to be added in the Concept Card notes explaining the rationale.

   b. <u>Learning Outcomes</u>. A learning outcome is a concise statement that describes what students are expected to learn as a result of completing a program or course of instruction or curricula. Stated another way, a learning outcome is an intended effect of the educational program experiences that has been stated in terms of specific, observable, and measurable student performance. The subordinate elements of a learning outcome are called educational objectives, which must collectively be learned to accomplish the broader expectations of the learning outcome. An educational objective is defined as a concise statement that describes what students are expected to learn as a result of an individual class or lesson within a program or course of instruction. The statement begins with an action verb that indicates the desired level of learning (in accordance with accepted educational taxonomies) and corresponding type of assessment. The action verb is followed by an explanation of the specific subject matter to be learned.

4. <u>Management of Marine Corps Formal Instruction</u>

   a. <u>Program of Instruction (POI)</u>. A POI is a service-level training and education management document that describes a formal course in terms of structure, delivery systems, length, intended learning objectives or outcomes, and evaluation procedures. Amplifying information can be found in reference (b).

(1) <u>POI Requirement</u>.  An approved POI is required for every course a Formal School delivers signed by the approving CG.  POIs developed and approved by other services shall be accepted as POI equivalent documentation as long as the OccFld Manager, TECOM TA, and the Formal School concur that the T&R event requirements for the particular course are being met by the other service POI.  EXEMPTION: MAWTS-1 will only be required to submit section I of CDD.  POIs not embedded within the WTI course (i.e. not outlined in the  MAWTS-1 Course Catalog) will adhere to the Proof of Concept CDD policy outlined in the subsequent paragraphs.

(a) <u>Commanding Officer's (CO) Cover Letter</u>.  CO/OIC/DIRs shall certify the validity and accuracy of a POI by signing and routing a cover letter to the appropriate CG via their administrative chain of command, submitted as close to the signature date as feasible.  Should substantive changes be made to the POI following the initial submission, a new cover letter should be signed, dated, and submitted to the appropriate CG for approval.

<u>1</u>.  <u>Format</u>.  In standard Naval letter format on required letterhead, the CO will address in narrative:  any shortfall(s) in funding, personnel, and equipment, as well as changes in course days.  The cover letter should not contain all the details of revisions to items 21, 22, 23 in the Course Descriptive Data (CDD), but rather point the reviewer to those changes that were validated in the Record of Proceedings (ROP).

<u>2</u>.  <u>Submission</u>.  The POI, POI checklist, CCRB ROP, and CO's cover letter will be sent electronically in a Portable Document Format (.pdf) to MTESD OPS via sharepoint at https://vce.tecom.usmc.mil/sites/directorates/mtesd/SitePages/Home.aspx.  The POI will be in a "Submitted for Review" status in MCTIMS prior to submitting to sharepoint for disposition.  If there is a disparency between the POI in MCTIMS and the electronically submitted version, the POI will be formally returned to the Formal School.  Upon receipt, the CG will reply via formal correspondence, as appropriate.  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.  Annually, additional resources need to be programmed through TECOM G-8 via the Program Objective Memorandum (POM) process.

(b) <u>Section I (CDD)/Other Service Supplemental CDD</u>.  The CDD is the key document for all TECOM activities involved in the resourcing process and validation of Marine Corps training and education requirements in addition to other service curricula.  Accurate reporting of the school's resources and requirements will provide the documentation and justification required to compete for resources in the POM process.  Failure to provide accurate resourcing data in the CDD jeopardizes future funding for the Formal School.  Formal Schools will complete all 24 elements of the CDD based on service/other service data and submit for staffing and approval.  See Appendix A for a breakdown of the 24 elements.

<u>1</u>.  <u>Submission</u>.  Formal Schools will review all CDD portions of active POIs annually or more often as necessary in connection with the TECOM, G-3/5/7 and G-8 annual budgeting and programming requirements.  The task list located in the CDD only lists those ITEs that were selected for training within the POI and must include all ITEs relevant to the scope and TPD of the course.  JLOs should also be manually entered and specified on the CDD task list.

2. <u>Resources</u>. Items 21, 22, 23 and/or the "CDD NOTES" after item 24 identify resource requirements. It is imperative that the school indicate the actual deficiency (course requirement minus authorized Table of Organization (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.

a. <u>Instructor Staffing Requirements (Item 21)</u>. Instructor staffing requirements are based on the academic course hours and computed by MCTIMS in the Instructor Computation Worksheet (ICW) of the POI. The number of instructors reported should be a whole number or a factor of the maximum class capacity. 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 cards must match the maximum class capacity.

b. <u>School Overhead Requirements (Item 22)</u>. School overhead requirements reflect the total personnel overhead requirement for the entire school with the same fields identified in para (21) above (i.e. personnel detailed to support of that POI full-time, yet not in contact with students).

c. <u>Training/Education Support Requirements (Item 23)</u>. This field can be edited to list resource requirements other than personnel. It will identify all requirements, but specifically emphasize the portion that exceeds current availability.

(c) <u>Section II (Summary of Hours)</u>. Formal Schools will determine and record the appropriate amount of academic and non-academic time necessary to meet the learning requirements of the POI. Annexes A-Y are for academic concept cards and Annex Z is reserved for administrative concept cards.

1. <u>Academic Time</u>. Time required to transfer learning objective based instruction, outcome based instruction, lesson purpose instruction, or evaluating performance. The <u>minimum</u> peacetime course day is 8 hours. The minimum peacetime course week is 40 hours. (8 hours a day multiplied by 5 working days). The <u>minimum</u> amount of daily academic time is 7 hours. If the training day exceeds 8 hours, only 7 hours can be associated to "new" not previously taught material.

a. <u>Training Day Calculation</u>. All time (academic and non-academic) related to training, must be accounted for in training days and, consequently, in the calendar days of the course. All administrative hours will be distributed across the number of training days thus calculated. TAs will review the average training day and average training week to evaluate if additional justification from the Formal Schools is required for excessive academic day length. NOTE: Formal Schools will not use the provisions of this paragraph to recalculate the duration of a legacy POI to justify adding additional training days to that POI.

b. <u>Training Day formula</u>. Divide total academic hours by 7 and multiply by 5. If there are insufficient academic and non-academic hours for a course to have at least 8 hours a day, then the duration of the course must be shortened by the number of days that will result in a minimum of an 8 hour day.

<u>c</u>. <u>Calendar Day formula</u>.  Divide total training days by 5 and multiply by 7.

2. <u>Non-academic Time</u>.  Time instructors are in contact with students as required by the CG TECOM directives, various Marine Corps Orders, and the POI.  Non-academic time can include, but is not limited to:  Physical Training (exceptions see para <u>b</u>. below), Chow, Equipment Draw/Issue, Transit, Field day, Overnight Duty (Duty NCO, Firewatch, etc).

a. <u>Administrative Time</u>.  Time required in the POI to complete administrative tasks necessary for the smooth functioning of the course.  Administrative time can include, but is not limited to:  Checking in/out, Graduation practice/graduation, Specialized uniform/equipment fittings, Medical appointments, Weapons cleaning.

b. <u>Physical Training (PT)</u>.  PT will only be considered academic time when the specific PT event has a learning objective(s) based on the ITEs derived for the same T&R Manual that provide the other ITEs for the course.  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.

3. <u>Lesson Purpose</u>.  A Lesson Purpose class presents material that, while important, does not contain learning objectives of a specific individual or collective training event and is not testable. Formal Schools 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, Formal Schools may justify additional hours at POI submission with the task analyst.

4. <u>Remediation</u>.  Remediation is neither academic nor administrative time and must be conducted in order to provide additional training to the student.  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.  The Formal School will provide a description of the approach to remediation in Section V of the POI.

5. <u>Training Schedule</u>.  The training schedule will contain, at a minimum, the lesson designators, lesson titles, and academic hours.

(d) <u>Section III (Scope of Annexes)</u>.  This section carries a subheading, academic subjects, 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.

(e) <u>Section IV (Concept Cards)</u>.  This section comprises the bulk of the POI and provides 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 the learning objectives report, and summary of instructional hours.

1. <u>Concept Card Hours</u>.  Concept Card hours represent the amount of time required to teach the Learning Objectives and Learning Outcomes assigned to a Concept Card to standard.  These hours are a calculated representation of the amount of time it will take to execute the assigned instructional methodologies.  Formal Schools are provided the

opportunity to run Pilot Courses to validate the instruction, particularly the instructional methodologies and amount of time assigned to Concept Cards. However, the decision to use a pilot course as a validation method is based on resources, the availability of the necessary members of the target population, and time.  The first full iteration of the course must allow the Formal Schools the opportunity to validate instruction.  Following the first full iteration, Formal Schools will be authorized to conduct a hot wash or after-action, validate Concept Card methodologies and hours, and make appropriate changes.  Changes will be made and recorded on the POI Record of Changes page located in the POI.  Any subsequent changes to Concept Card hours must be coordinated through the TECOM Task Analyst and authorized by the approving CG.  Any Concept Card changes that affect an increase in training days or resources will require a resubmission of the POI for approval.

(f) Section V (Student Performance Evaluation).  This section documents the scope of the evaluation, standards for successful performance, and evaluation procedures.  Student evaluation must be detailed and include, at a minimum, the evaluation philosophy (mastery/non-mastery/GPA), methods of evaluation (e.g. written, performance, remediation), Fitness Reports (if applicable), Pro/Con marks (if applicable), disposition of academic failures (recycle/MOS re-designation procedures).  Section V is developed in accordance with reference (b) and the Academic SOP.

(g) Section VI (Distribution List).  This section details who receives the POI.

(2) POI Validation.  The designated resource manager at the Formal School shall review and validate POI resource information (e.g. CDD) prior to submission.  CO/OIC/DIRs shall verify the POI information is an accurate communication of how the Formal School is executing resources for that course prior to staffing via the chain of command to the appropriate CG for approval.

(3) POI Prioritization.  Priority Level 1 courses have the highest priority for curriculum development.  Formal Schools will prioritize all POIs according to the following criteria.

(a) Priority Level 1.  Primary MOS producing courses. Description: Courses that impart the primary occupational skills and knowledge of a Marine.  Per reference (k), this level includes all courses necessary for completion prior to awarding of a primary MOS.  Also included in this level are formal training requirements for:

1.  Officer Candidates School for active duty enlisted members attending as part of an enlisted commissioning program

2.  Warrant Officer Basic Course

3.  Special Duty Assignments

(b) Priority Level 2.  All other MOS producing courses. Description:  Per reference (k), courses that result in the following types of MOS's:

1.  Intermediate/Advanced Necessary MOS (NMOS)

2. Free MOS (FMOS)

3. Exception MOS (EMOS)

4. Additional MOS

(c) Priority Level 3. Required resident PME and the resident portion PME of blended programs as defined in reference (b).

(d) Priority Level 4. PMOS skill progression, sustainment, recertification, and advance certification training. Description: Formal School training for Marines already holding a PMOS. These courses are mandated in a written directive to maintain, progress, certify/recertify, or provide advanced skills in the Marine's PMOS. All holders of the PMOS are required to attend such training based on MOS advancement, selection for promotion and/or expiration of a PMOS related certification/qualification.

(e) Priority Level 5. PMOS skill enhancement and non-MOS billet specific training. Any course not falling into one of the previous levels. These courses have a defined requirement for formal training and meet common requirements for unit's throughout the Marine Corps. Examples include, Aviation Safety Officer, Ground Safety Officer, Methods of Entry, and Static Line Jumpmaster. This level is not intended to include all formal courses. Courses required for unit specific missions when attendance is based on the CO/OIC/DIR's discretion and all training indicated as Unit Training Management (UTM) and/or MOJT is unit/organization funded.

(4) POI Staffing

(a) Informal submission. Prior to formal submission of the POI, schools are required to contact the TA responsible and in coordination with MTESD Ops to conduct an informal review of the POI within 10 days to determine if the POI is ready for staffing/submission. Given the Course Content Review Board (CCRB) Battle Rhythm identified in Chapter 4, the TA can anticipate when their Formal Schools will be reviewing and updating POIs. The goal of informal submission is to prevent/mitigate potential reasons for rejection/delay that might occur during the POI staffing process. Due to the volume and tempo of POI review, submission, and approval, the period of informal submission in which the TA reviews the work product in progress to provide guidance is essential to correcting errors prior to formal submission.

(b) Formal submission. The start date of the 60 calendar day staffing and approval process is determined by MTESD OPS. It begins upon receipt of a POI that is determined to be suitable for review and staffing. If the POI is returned for correction, then the start date is reset pending the next submission.

1. MTESD TA. After informal collaboration with the TA and when a school is ready to submit a POI for approval, the school will send a ".pdf" version of the POI cover letter, POI checklist, and CCRB ROP to MTESD Ops via sharepoint at https://vce.tecom.usmc.mil/sites/directorates/mtesd/aspx. In coordination with MTESD Ops, the TA will conduct a compliance review of the POI to determine if the POI has been drafted in accordance with this directive and reference (c). If the POI is determined to have substantive errors, the CO/OIC/DIR will be notified of the errors via official correspondence in

order to make necessary corrections.  The POI staffing clock will restart upon formal re-submission of the returned POI.  If the POI does not have errors, the TA staffs the POI to the appropriate staffing destinations for review, comments, and recommendations.  Once the compliance review has been completed, the approval process can continue through the appropriate chain of command.

      a.  <u>Approval Authority</u>.  POI approval authority rests with the appropriate CG, depending on the chain of command for the Formal School.  After signature by the appropriate CG, the approval/disapproval letter is attached to the POI and returned to the Formal School.

      b.  <u>Approval letter</u>.  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.  Preparation will occur based on staffing comments after receipt from MTESD Ops in order to complete the POI Review.  This letter will be worded only as follows:

      (<u>1</u>) "<u>Approved</u>".  This approval is contingent on the Formal School's 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.  For revised POIs, those courses will commence the approved POI with the next course iteration.  For new POIs that have undergone validation, Formal Schools will be required to commence the approved POI within 120 days of the signature date.

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

      (c) "<u>Approved, but further execution is not authorized until required resources are obtained</u>".  This conditional approval prohibits the Formal School 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 timeline for delivery of the resources.

      2.  <u>MTESD Ops</u>.  Monitors the responses to the staffing initiated by the TA.  In addition, MTESD Ops will continue staff action to refine and resolve resourcing issues.  The appropriate staffing destinations within TECOM for POIs are dependent on the particular chain of command of the Formal School.

      3.  <u>Staffing Destination Actions</u>.  HQ staff conducts appropriate staff action to review, validate, and recommend resourcing, prior to submission to the CG for approval.  This action is required for all 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 and/or learning outcomes are being addressed regardless of the service teaching the course.  Manpower, facilities, ammo, ranges, and supply/equipment, etc. will identify resource shortfalls in their commodity area.  Where issues may be resolved internally,

HQ staff will make recommendations such as: adjust MCBUL 8011 to increase ammunition allocations, reassign personnel, adjust budgets to provide additional funding, etc.  HQ staff will clearly state any necessary follow-on actions required and who is responsible for initiating the action.  When internal resolution is not possible, HQ staff will detail actions to be taken, and provide an estimated timeline for when resources can be put in place.  HQ staff is directed to seek non-traditional solutions to address resource shortfalls until programming can be affected.  All comments will be drafted as if the Commanding General is communicating to the appropriate Formal School CO/OIC/DIR.

        4.  <u>Formal School Actions</u>.  CO/OIC/DIRs shall ensure that the POI will be submitted within 120 days of a TECOM Directed CCRB.  The Formal School, in concert with the assigned TA, will formulate a plan that outlines a POA&M for all CCRBs to include POI submission.  Upon approval of a T&R, if a school chooses to conduct a post T&R review to discuss and codify recommended changes, then it has the ability to do so - but that is not the function of a CCRB.  For POI revision, para 4.a.(5) explains the process for submitting POI change documents to MTESD OPS.

        a.  <u>Mirror-imaged POIs</u>

        (<u>1</u>)  If a specific TECOM MSC owns mirror-imaged POIs where all of the mirror-imaged schools belong to the same MSC (e.g. Sniper school), that MSC may establish policy for functional area subject matter expertise with the responsibility to ensure standardization between the Formal Schools that teach that functional area.

        (<u>2</u>)  For courses taught at multiple locations that include multiple MSCs (e.g. Marksmanship, MCCWS, MCMAP), the mirrored schools will submit the POIs simultaneously and therefore require a Joint CCRB.  In these cases, representatives from all Formal Schools or training venues that teach the respective course(s) will be convened to ensure curriculum content remains consistent between course locations.  The Functional SME designated by Marine Corps policies will be responsible for standardization review of all mirror-imaged POIs.  Schools required to execute POIs must revise and submit a site specific CDD for that school.  Upon approval, a CID will then be assigned to the POI that includes the school code from the school submitting the data.  For example:  All marksmanship ranges across the Marine Corps creating Marksmanship Instructors will have mirror-imaged POIs, 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.

        (<u>3</u>)  At the conclusion of the Joint CCRB, the MTESD TA will compare the parent POI against the CCRB ROP, so that only those recommended changes are included in the POI.  The MTESD TA will then forward the parent POI through the formal staffing process for approval.  NOTE: It is likely that there will be more than one MTESD TA in a functional area.  Therefore, MTESD is responsible for conducting the appropriate coordination to ensure Functional SMEs have the opportunity to review all mirror imaged POIs.  Once approved, the parent POI will be provided to all mirror-imaged schools so they can submit their individual POIs.  Upon receipt of all mirror-imaged POIs, the MTESD TA will then forward the POIs to the Functional SME to complete the standardization review.  Once reviewed, the Functional SME will return the POIs to the MTESD TA with comments.  POIs found to be compliant will continue in the formal staffing and approval process.  POIs

found to not be compliant with the parent POI will be returned to the Formal School for correction.  During the standardization review, Functional SMEs shall review the following POI components: T&R Task List, Location of Learning Objectives Report, Concept Cards, and those items in the CDD that are not school location specific (e.g. ammunition).

(4)  Functional SMEs are not authorized to approve POIs belonging to another TECOM MSC.  Standardization review does not constitute approval of the POI.  The POIs must be approved by the respective TECOM approval authority.

b.  Joint Instruction/Other Service School POIs.  For those courses of instruction conducted at other service schools, course data will be reviewed every three years and equivalent course documentation and other service supplemental CDD will be submitted in the format designated by MTESD.  Formal course revision is only authorized when an updated POI, along with a cover letter detailing the proposed revisions, is approved by the appropriate CG.  Additionally, course revision can also be authorized via a formal approval letter from the authorizing CG.

(5) POI Revision

(a) POIs are dynamic documents and will generally be modified through the Formal School Evaluation Plan (FSEP) and the CCRB.  They can have minor revisions made during a "Command Directed" CCRB as described in the subsequent paragraphs and Chapter 4.  Any modifications to the POI, other than the minor revisions noted in this paragraph necessitate the resubmission of the POI to the appropriate CG for review.  EXEMPTION:  MAWTS-1 conducts an internal POI revision for each WTI course through its Curriculum Review Committee (CRC).

(b) Allowable local revisions are those that do not require additional resources, add additional training days, or modify existing ITEs/TLOs/Learning outcomes.  CO/OIC/DIRs are not authorized to "locally approve" revisions to the POI when those revisions involve task list/T&R modification or revisions in required resources to include revisions in the overall duration of the course.  All local revison changes must be annotated on the Record of Changes page of the associated POI.  "Out of cycle" revisions reflected in the working copy of the T&R Manual, must be coordinated by the TA with the appropriate Formal School and validated by the OccFld manager.  These validated T&R events may be immediately integrated into formal school instruction, but must be formalized by submitting a POI page change package for approval.  Page change documents may include any or all of the following: CDD, T&R Task List, Location of Learning Objectives Report, and applicable Concept Cards.  The POI change package will be submitted to MTESD Ops section via the following email address: TECOM.MTESD.OPS@USMC.MIL for appropriate staffing.

(c) If revisions are immediately required following approval of the POI (i.e., modification of the task list in the T&R Manual, or revisions due to resource requirements are necessary), those revisions will be identified to the appropriate CG via the MTESD TA listing the necessary revision, justification for revision, and the impact on execution of the POI.  In addition, the Record of Changes page of the approved POI must contain all the required information necessary to document the revision.  Additionally, a copy of the formal communication exchange between the Formal School and the MTESD TA must be included in the local POI documentation.

(d) When revising an existing POI, or for a new POI that does not require a Proof of Concept CDD, the Formal School will identify the necessary changes required to modify the POI and associated documents.  In this case a complete POI submission is not required – only those elements of the POI that need to be changed.  Once the POI is developed, it is forwarded to the appropriate CG for approval.  In the event there are resource shortfalls, the school must detail actions planned or already underway to resolve those deficiencies (e.g. MILCON requests, Tables of Organization and Equipment Change Requests (TOECR), request for additional funding) and explain the impact of not having these resources in place.  These documents 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 OPFOR and OccFld manager's requirements.

(e) If a POI needs to be revised prior to the CCRB Battle Rhythm (identified in Chapter 4) and there are resource or T&R implications, then the POI should be submitted following a TECOM Directed CCRB.  Full justification for any recommended changes that accompanies the revised POI shall also be included in the CO's cover letter.  The POI shall be accompanied by the CCRB ROP as an enclosure when the POI is submitted for approval.

(f) Reasons for revising a course include, but are not limited to, validation of recommendations from formative/summative data presented at CCRBs, 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.

(g) Time-critical changes to T&R Manuals reflected in the working copy of the T&R Manual and approved by OccFld manager, TA, and/or T&R sponsor, may be immediately integrated into instruction, but must be formalized by submitting an updated POI for approval.

b. <u>American Council on Education (ACE)</u>.  The ACE provides oversight for educational institutions and in this role provides recommendations for college credit to POIs developed by the Marine Corps.  Proceduraly, once a POI is approved, CG TECOM (C 466 MTESD) will conduct a cursory review for those POIs that meet the criteria below in order to determine if it meets the eligibility requirements.  If the cursory review determines that the course should receive vocational/collegiate credit, then CG TECOM (C 466 MTESD) will coordinate, schedule, and oversee the ACE evaluation.  All POIs that are determined to receive an ACE review will be conducted virtually or on-site.  If an on-site review is recommended, CG TECOM (C 466 MTESD) will coordinate logistical/review requirements with Formal Schools.  During the review, ACE will assess the POI, Master Lesson Files (MLF), and examinations in order to determine appropriate vocational/collegiate credit recommendations.  The ACE Review is not a core mission of TECOM.  Rather, it is an effort by the Marine Corps and TECOM to keep faith with those Marines that aspire to reach education goals in which the Marine Corps can assist in that process with minimal impact to the overall mission.

(1) All POIs, to include Enlisted PME, must meet a minimum of 45 academic hours in order to qualify for an ACE review.

(2) Officer courses/PME are reviewed for rigor and scope to determine whether or not the course of instruction provides equivalency for

vocational/collegiate credit above the baccalaureate level.  Restricted Officer courses/PME adhere to the process for Enlisted courses/PME.  It is possible for a POI to meet the minimum amount of hours, but not receive ACE accreditation.

c.  <u>Courses that Move from One Geographic Location to Another</u>.  If a course is required to change venues for whatever reason from one geographic location to another, provided there is no other change to the content, duration or personnel required to instruct the course, the gaining Formal School must submit to MTESD Ops the Formal School specific CDD NLT 30 calendar days following execution of the move.  However, if the change in venue will necessitate substantial changes to the course, the gaining Formal School will conduct a TECOM directed CCRB and follow the process identified in this chapter and Chapter 4.

d.  <u>Proof of Concept CDD</u>.  At times, following CCRB recommendations or a CO/OIC/DIR's initiative, Formal Schools will recommend new instruction to meet an existing learning gap or a critical learning requirement.  Prior to formal submission, schools are required to contact their respective TA and conduct an informal collaboration of the Proof of Concept.  The goal is to prevent/mitigate unnecessary expenditure of resources due to manpower and workload.  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.

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

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

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

(4) POIs for Proof of Concept CDDs will be submitted to CG TECOM (C 466 MTESD) within 120 calendar days following approval by the CG.

(5) Proof of Concept CDDs will not be created nor submitted for a new course that has been directed by TECOM or its MSCs, MCCDC or higher.  Formal Schools will conduct a learning analysis and develop a Proof of Concept CDD for submission following notification that the events to be trained have been entered into MCTIMS or, using existing events that had an initial training setting of MOJT have been modified so that the initial training setting is FORMAL.  The POI for this new, directed course will be submitted within 120 calendar days of notification utilizing the Proof of Concept CDD Template in MCTIMS CMD.

e. <u>Master Lesson File (MLF)</u>. An MLF is a compilation of living documents that are kept in the school to provide everything needed to conduct a lesson. The MLF serves as the central repository for all the instructional and supporting materials for a given lesson. An MLF must exist for each concept card in a POI. Course information contained in the MLF and the training schedule must match the approved POI. For those lessons containing Interactive Multimedia Instruction (IMI), a student outline and IPG for that portion of the lesson must also be maintained in the MLF. EXEMPTION: MAWTS-1 Course Catalog meets the requirement for the MLF. Minimum requirements are based off the MAWTS-1 POI.

(1) MLF development must be concurrent with POI revision to facilitate the expectation. For new POIs that have undergone validation, Formal Schools will be required to commence the approved POI within 120 days of the signature date. If course materials cannot be updated to reflect the approved POI prior to the next iteration, then page change documents will be developed to provide to the students. MLFs should be reviewed annually by designated Academic Faculty to ensure accuracy of the POI and assist in trend analysis. In doing so, it is recommended that a review log be maintained for record keeping and historical data. The contents of this log is at the discretion of the Formal School CO/OIC/DIR.

(2) MLFs will contain at a minimum, the below material. In a lesson purpose class, the first two items are omitted. CG TECOM requires that these items be uploaded to the MCTIMS Training Resource Module for each lesson in the POI.

(a) Learning Analysis Worksheets (LAW)

(b) Learning Objective Worksheets (LOW)

(c) Concept Cards

(d) Lesson Plan

(e) Student Outline

(f) Media (or a description of the media and location)

(g) Instructor Preparation Guide (IPG)

(h) Risk Assessment Worksheet (RAW)

(i) Supplemental Student Materials (if applicable)

f. <u>Master Course Files (MCF)</u>. Schools must maintain MCF data, which can be electronic or paper-based. MCFs should be maintained for at least three years. By maintaining a MCF for each iteration of a course, all data regarding a particular class can be easily assessed for reviews, inspections, investigations, or CCRBs.

(1) The following documentation, at a minimum, shall be maintained:

(a) T&R Manual or other service ITEs (for joint schools)

(b) POI (incl Record of Changes and supporting documentation)

(c) Master Lesson File (MLF)

(d) Record of Proceedings (ROP)

(e) Training Schedule

(2) Per reference (c), as part of the Formal School Evaluation Plan other formative and summative data relevant to course review will include: test results (e.g. reports, statistics, item analysis), After Instruction Reports, End of Course Critique, graduation rosters, Master Course Schedule, CCRB materials, ROPs, POI Submission Letters, other documentation that directs change to the course (e.g. from HHQ, Advocates, Program Offices).

g. <u>Computer Based Training (CBT)</u>. This directive establishes the requirement for all Formal Schools to conduct Marine Corps Instructional Systems Design (MCISD)/Systems Approach To Training and Education (SATE) and Risk Management (RM) indoctrination, or refresher training as required for all Formal School personnel within 30 calendar days of assignment. However, TECOM has identified that there are several service-level CBT products that are unaccessable or non-operational via MarineNet. Until these products become available, Formal Schools will access the MCTIMS Training Resource Module and download associated lesson materials under CID M03KHXA. These lesson materials are appropriate and meet the service-level requirement. Formal schools will integrate MCISD/SATE and RM training into their Staff and Faculty Development Plans.

CHAPTER 2

ACADEMIC FACULTY AND SUPPORT PERSONNEL

1.  Introduction.  This chapter identifies roles and responsibilities
associated to Formal School Academic Faculty and Support Personnel to assist
schools in the development of their Academic SOPs.  This is not an all-
encompassing list, but does contain some of the most common positions
according to the task organization.  In addition, MTESD assigns a TA to
manage each OccFld and serve as the SME on TECOM programs, policies, and
procedures; therefore, TA responsibilities are identified to provide
transparency in the billet description.  This chapter can be used to assist
Formal Schools in conducting a "troop to task" analysis by providing
appropriate information for the assignment and designation of specified
duties.

2.  Academic Faculty and Support Personnel.  Each Formal School is uniquely
task organized to its mission.  The standard structure and descriptions
generally encompass those identified in this chapter.  In order to foster
continuous improvement, the professional development of staff and faculty
needs to be codified and articulated appropriately in a Staff and Faculty
Development Plan (SFDP).  These individuals directly or indirectly contribute
to the primary mission of the school and are solely focused on the transfer
of learning to the students within their institution.

    a.  Academic Faculty.  Consists of military personnel and civilians who
are directly involved in the design, development, instruction, assessment,
revision, and adaptation of the POI or curricula to ensure its standards,
quality, and relevance.  Additionally, faculty members should be engaged in
the research, service, community of practice, and professional development in
their areas of competency.

        (1) Civilian.  Strategies for recruiting and retaining civilian
faculty are based largely on the particular needs of each educational
program.  To meet these needs, TECOM employs civilian faculty members (GS,
Title 10) to fill positions within the organizational structure and
commensurate with references (l) and (m).  TECOM also employs civilian
contract employees to serve as full-time faculty in specified areas within
the institution.

        (2) Military.  The military faculty includes both officer and
enlisted personnel of various ranks who are assigned to a designated Formal
School for approximately three years.  In many cases, TECOM works closely
with HQMC and M&RA to ensure that highly qualified faculty members are
assigned to meet the mission requirements of its colleges, schools, and
academies.  The Marine Corps classifies and assigns military personnel
worldwide as equitably as possible to ensure a high state of readiness and
the availability of highly qualified personnel to meet the requirements of
each of the Formal Schools.  HQMC should be consulted for a complete list of
assignment criteria and requirements for military instructors.

        (3) Adjunct.  CO/OIC/DIRs may occasionally request adjunct faculty
members to augment the teaching faculty of resident courses of instruction.
Adjunct faculty members may consist of active duty military (officers or
enlisted) or qualified civilians with military experience (retired officers
or enlisted) who possess sound leadership practices and the operational

experience and acumen to enhance resident, non-resident, or blended approaches to training and education.  Likewise, adjunct faculty may also include civilian government employees and academic scholars who possess appropriate degrees, qualifications, and competencies in the teaching disciplines related to training and education.  The decision on reimbursement for these services will rest with the CO/OIC/DIRs.  The utilization of adjunct faculty can be found in the Formal School Academic SOP.

    b.  Support Personnel.  Support Personnel are primarily responsible for the general support of the Formal School (e.g. administration, supply, logistics, operations).  Although support personnel focus on the day-to-day operations of the Formal School, they can also be requested to assist faculty members as an adjunct member.

3.  Formal School Roles and Responsibilities

    a.  Commanding Officer/Officer in Charge/Director (CO/OIC/DIR)

        (1) Requirement.  Ensure approved training and education requirements meet the readiness needs of the OPFOR and supporting establishment and are in line with designated policies and directives.  Identify those personnel required to attend the appropriate service-level course and ensure they have met all prerequisites in accordance with the appropriate screening checklist prior to performing their specific duties.  It is recommended that the CO/OIC/DIR attend the designated service-level formal school management course.

        (2) Responsibilities

            (a) Shall be identified and assigned by the appropriate CG to manage a Formal School or Training Detachment and execute the provisions of appropriate policies and directives.

            (b) Approve a plan that outlines a CCRB Battle Rhythm POA&M, to include POI submission.

            (c) Review, endorse, and forward the CCRB Battle Rhythm POA&M to the appropriate HHQ for staffing and approval by the CG.

            (d) Plan and conduct CCRBs for each course of instruction or sub-course within a curriculum, at a minimum, once every three years.

            (e) Provide qualified SMEs who can speak on behalf of the Formal School CO/OIC/DIR to participate in the development of Marine Corps individual and collective events during T&R Manual Working Groups.

            (f) Plan and conduct POI revision within 120 calendar days of the signed T&R Manual and prior to the deadline for submission of POIs for all affected courses.

            (g) MLFs shall be maintained for each lesson in the POI containing the required components identified in Chapter 1.

            (h) Ensure all Formal School personnel receive MCISD/SATE and RM training within 30 calendar days of assignment.  Integrate this training into the Staff and Faculty Development Plan, as appropriate.

(i) Ensure RM is conducted for all lessons contained in the POI, to include an RAW and Cease Training (CT) criteria and procedures, as part of the MLF.

b. <u>Academics Officer</u>. Primary responsibility is for the execution of the MCISD/SATE process and the provisions of appropriate directives within the Formal School.

(1) <u>Requirement</u>. Each Formal School is required to have an Academics Officer. This individual shall complete the designated service-level formal school management course and curriculum development course.

(2) <u>Responsibilities</u>

(a) Shall be designated in writing by the CO/OIC/DIR and will be assisted by the Formal School Adviser in execution of the provisions of appropriate directives.

(b) Responsible for all Formal School POIs. This includes assisting the appropriate personnel with the design, development, submission, evaluation, and maintenance.

(c) Administer and guide POI development, evaluation, and maintenance in accordance with MCISD/SATE, current policies, and MCTIMS.

(d) Ensure the regular observation of lessons in all courses using the MLF as one means for gathering evaluation data.

(e) Administer and guide MLF development, evaluation, and maintenance to ensure proper lesson quality, compliance with the MCISD/SATE process, and adherence to Marine Corps doctrine.

(f) Administer and guide internal and external evaluation of the POI in order to validate the effectiveness of the course, measure retention of the materials taught, and gather data for revising the instructional program.

(g) Function as the staff lead in the development, execution, and enforcement of the Formal School Academic SOP. Academic SOPs will comply with the requirements established in this directive for Staff and Faculty Development and Formal School Evaluation.

(h) Responsible for planning, preparing, facilitating, and consolidating CCRBs along with submission of POIs to higher headquarters.

(i) Manage and implement a Staff and Faculty Development Plan.

(j) Manage and implement a Formal School Evaluation Plan.

c. <u>Formal School Advisor (FSA) (formerly Formal School Manager)</u>. Primary responsibility is to ensure the CO/OIC/DIR, Academic Faculty, and Support Personnel have a working knowledge of all academic references, policies, and directives to include the unique requirements of administration in a Formal School. FSAs can best serve the needs of the CO if they are a Special Staff Officer to the CO/OIC/DIR. Traditionally, FSAs have been GS civilians who can provide continuity in this critical staff function. The FSA shall have direct access to the CO/OIC/DIR in order to advise on policy,

doctrine, Formal School administration, and any other pertinent issues within the schoolhouse.  This staff function can be a collateral duty for the XO, Operations Officer, Academics Officer/DOA, Deputy Director, Academics SNCOIC, Chief Instructor, etc., or in the case of larger Formal Schools, a separate staff position.

(1) Requirement.  Each Formal School is required to have a FSA.  This individual shall complete the designated service-level formal school management course and curriculum development course.

(2) Responsibilities

(a) Shall be designated in writing by the CO/OIC/DIR and will assist in the understanding and execution of the provisions of appropriate directives.

(b) The FSA should maintain a desktop turnover binder to include, at a minimum, the FSA designation letter, the most current versions of academic references, policies, and directives including previous versions (for historical purposes), a copy of the most current Functional Area Checklist (FAC) 400 checklist, the results of the last two internal FAC 400 inspections conducted by the FSA, and the inspection results for the last two formal CGIPs.

d.  Course Chief.  CO/OIC/DIRs will assign in writing the most qualified personnel as Course Chiefs.  Course Chiefs will be active duty Marines drawn from the assigned faculty and are responsible for the maintenance of course documents and the conduct of a specific course.  If the school Task Organization (T/O) does not permit an active duty Marine to fill this billet, then the CO/OIC/DIR can make the determination as to who is the most qualified.

(1) Requirement.  Complete the designated service-level instructor course(s) and curriculum development course.

(2) Responsibilities

(a) Primary oversight for respective POIs and is expected to perform and supervise curriculum development duties.

(b) Maintain cognizance over the T&R revision and CCRB Battle Rhythm timelines and be prepared to provide recommendations that directly impact respective POIs.

(c) Participate in CCRBs for assigned POI(s) and conduct site visits, as required.

(d) Coordinate all aspects of each course iteration, to include class scheduling, instructor scheduling, After Course Reports (e.g. AIR, ECC), and all course associated requirements.

(e) Review all previous comments on AIRs and ECCs, provide data point requests to graduate surveys, as well as site visits in order to determine immediate marginal changes necessary and broad changes for consideration at CCRBs.

(f) Perform platform instruction albeit with a reduced course-load, so duties can continue to be fulfilled as Course Chief.

(g) 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. Three-year plan outlining CCRBs, POI submission, and MLF completion.

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

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

4. Instructor Certification Roster showing which instructors are certified to instruct which lessons. This roster must be routinely updated based on instructor flow.

5. Maintain the After Instruction Report summarizing each course iteration.

6. Post-Graduate Surveys conducted via 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. Ensure the Course Structure contains at a minimum: Lesson Designators, Lesson Titles, Methods and Academic hours - each from the pertinent Concept Card.

e. Curriculum Developer/Administrator. Curriculum developers must be adept at rapidly adapting to emerging learning technologies that, coupled with modern instructional design strategies, will improve overall effectiveness of the learning environment.

(1) Requirement. Categorized as a Marine, civil servant, other service member, or civilian contractor who conducts the Analyze, Design, Develop, Implement and Evaluate (ADDIE) phases of the MCISD/SATE process for each POI within the Formal School. Regardless of previous assignment, training or education, all personnel in designated curriculum development billets (e.g. TECOM TAs, Course Chiefs, Academics Officers, military and civilian curriculum developers, Action Officers) will attend the service-level course for curriculum development within 120 calendar days of assignment. Staff and faculty that assist with curriculum development and management of POIs and MLFs may attend this course provided the Academic SOP clearly articulates this requirement in their billet description.

(2) Responsibilities

(a) Each POI will be designated at least one curriculum developer/administrator, except in cases where a CGIP FAC 400 Formal School inspection has determined the need for additional curriculum developers/administrators for a course to be mission capable.

(b) Responsible for the design, development, and maintenance of MLFs for each POI.

(c) Review POIs for accurate information and ensure the correct POI is being used for the conduct of classes.

(d) Incorporate any changes (if applicable) identified by the instructors during conduct of the POI.

(e) Participate in the CCRB for each respective POI.

(f) Ensure the correct MLF is uploaded into MCTIMS TRM.

f. <u>Instructor</u>. Categorized as individuals assigned to a teaching billet or faculty position that facilitate learning as their primary duty. An instructor can be a Marine, civil servant, or other service member who teaches a designated course approved by the appropriate general/flag officer in the chain of command. Augmented personnel support used as training aids (e.g. role players, demonstrator cadre) for instruction are not categorized to be an instructor.

(1) <u>Requirement</u>. Completion of the designated service-level instructor course(s) or other service instructor course within 120 days of assignment. Per responsibilities established in this policy for the Course Chief, instructors will specifically support MLF development and management.

(2) <u>Responsibilities</u>

(a) Assist the academic faculty and support personnel in any additional duties required in order to meet mission accomplishment.

(b) Ensure that the learning environment is safe and conducive to promoting the transfer of learning.

(c) Support the student evaluation process and submit recommendations for POI changes for upcoming CCRBs/CRBs.

(d) Recommend revisions to instructional materials, as appropriate.

(e) Review or produce the AIR to describe unusual or mitigating circumstances affecting the conduct of the event and summarize trends in the IRFs.

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

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

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

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

g.  Faculty Advisor (FACAD).  Similar to the roles and responsibilities of an instructor, FACAD is a term that is used most commonly to describe the role of an individual assigned to a teaching billet or faculty position that facilitates learning within the organization.  A FACAD can be a Marine, civil servant, or other service member who teaches a designated course approved by the appropriate general/flag officer in the chain of command.  This individual uses adult learning methodologies, typically in a small group setting, to advance student learning and to provide one-on-one interaction with students (e.g. mentoring, coaching, counseling).  For specific guidance on how EDCOM utilizes Faculty Advisors, refer to the MCU Academic Regulations and the MCU Faculty Handbook.  Amplifying information on Title 10 statutes can be found in references (l) and (m).

(1) Resources.  Academic SOPs, the MCU Academic Regulations, and the MCU Faculty Handbook provide detailed examples for Faculty Advisors assigned to Formal Schools.

(2) Responsibilities.  The responsibilities listed below are not all inclusive and may contain, but are not limited to, the following examples:

(a) Shape learning outcomes, learning objectives, and specific curriculum content within educational objectives, instructional strategies, and teaching methods appropriate to achieving the program and student learning outcomes.

(b) Involvement in the research, service, and professional development in areas of competency to support training and education programs.

(c) Participate in various committees, CCRBs, Curriculum Review Boards (CRB), and working groups that deal with academic matters and academic policy issues, thereby creating an atmosphere of shared governance.

(d) Provide input into the decision-making and policy-making aspects of the training and education continuum.

(e) Focus on developing and delivering curricula, lecturing, instructing, facilitating discussions, seminars, as well as conducting scholarly research and publishing.

(f) Engage in reviewing works of others and other academic activities.

(g) Meet regularly with students to guide them in both professional and academic endeavors.

(h) Advise students in various capacities on their academic progress, projects, graduate theses, and professional development.

(i) Collaborate and share professional and academic experiences to enhance student learning.

(j) Arrange conferences and guest speakers, planning staff rides, and updating the learning management system.

(k) Develop and deliver curricula that will enhance students' ability to achieve these particular abilities and other relevant outcomes.

(l) Write measurable learning objectives and student learning outcomes, assess students' achievement of those objectives/outcomes, and seek continual improvement of their curricula based on the assessment of student learning.

(m) Comply with the policies and procedures related to these processes and the policies of applicable accrediting bodies, such as for MCU the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) and the Process for Accreditation of Joint Education (PAJE).

(n) Attend periodic faculty meetings and participate in academic processions, graduation, and professional development opportunities and events.

4. <u>TECOM Task Analyst Roles and Responsibilities</u>. As a member of the TECOM staff, the Task Analyst serves as the duty expert on TECOM programs, policies, and procedures relative to Marine Corps training and education.

a. <u>Requirement</u>. Each POI is assigned to a Task Analyst. This individual shall complete the designated service-level formal school management course and curriculum development course.

b. <u>Responsibilities</u>

(1) Monitor, review, and evaluate POIs, especially SDDs and CDDs, for effectiveness, accuracy, and compliance with directives.

(2) Monitor and provide guidance/assistance for the development and implementation of instructional programs in the training and education institutions.

(3) Establish and maintain a community of practice with appropriate agencies both internal and external to the Marine Corps in an effort to improve the quality of training and education for assigned OccFld, MOS, and Formal Schools.

(4) Develop and execute a broad range of analysis projects and studies required to ensure the formulation and implementation of optimally effective training and education programs.

(5) Function as the "chair" for T&R Working Groups and act as the "structural engineer" of the T&R Manual to ensure community T&R events/outcomes are maintained and reviewed at appropriate intervals and meet the identified needs of the OPFOR.

(6) Participate in Mission Essential Task List (METL) Working Groups, as required.

(7) Participate in CCRBs at the Formal Schools for which they have cognizance.

(8) Assist in the conduct of the Front End Analysis (FEA) process by conducting initial study preparation in order to scope objectives and define goals.

(9) Study technical material and make field visits to ensure the scope and content of a course is adequate.

CHAPTER 3

STAFF AND FACULTY DEVELOPMENT


1.  Introduction.  The Academic Faculty and Support Personnel are the center of gravity of any educational institution and as such, the development of these individuals should be paramount and prioritized by the leadership. Therefore, each Formal School needs to be committed to providing it's academic faculty and support personnel with high quality professional development experiences, made possible through learning opportunities created by the Formal School leadership.  The training and education of the Formal School Staff and Faculty begins, typically, with formalized instruction, but does not end there.  It is incumbent upon the schools to continue the development of their Staff and Faculty in order to build upon the foundations they gained at their initial entry learning stage.  This chapter identifies the service-level requirements that will be codified as part of the Formal School Academic SOP.  For specific guidance on how EDCOM conducts Faculty Development, refer to "Chapter Six: Faculty Development" of the MCU Academic Regulations.  For specific guidance on how MAWTS-1 conducts Faculty Development, refer to "MAWTS-1 Academic Standards, Processes and Procedures".

    a.  The individual faculty member, the Formal School, the Higher Headquarters, and the Marine Corps all share in the responsibility of creating and supporting the lifelong learner.  It is the responsibility of the CO/OIC/DIR to ensure that all personnel are well-prepared to execute their duties and responsibilities.  The continued development of faculty, both in their professional discipline and in educational theory best practices, is in the best interest of the faculty member and the institution.

    b.  The ultimate mission of the SFDP is to enhance and continue the development of Academic Faculty as an indispensable part of the adult education experience.  Embracing learning and investing in the human capital of our personnel by furthering their development will move the Marine Corps towards higher levels of expertise and respect, and ensure competent service to fellow Marines, both junior and senior.

2.  Requirements.  Each training and education institution will establish and implement a policy for staff and faculty professional development.  This plan is general in nature, so as to provide flexibility and tailorability among the formal schools to meet their needs.  Each Formal School will have an ongoing program to identify gaps in staff and faculty knowledge or emerging trends in training and education and adjust their SFDP accordingly.  Upon assuming command, CO/OIC/DIRs must conduct a detailed assessment of the Academic SOP and revise or tailor the program accordingly.  Because it must be designed and personalized to the strengths and weaknesseses of the individual school/command, the construct of the program will vary from school to school.  Formal Schools may add more to this plan, be more specific in certain areas, or add emphasis where needed.  However, at a minimum, the SFDP shall address each of the areas listed below.

    a.  Required formal training

        (1) Personnel assigned to selected Formal School billets will complete service-level training and education requirements dictated by this policy within 120 days of assignment to that billet.  At a minimum, personnel will attend the course pertaining to their billet, for example a Curriculum

Developer would attend Curriculum Developers Course (CDC), however, at the discretion of leadership within the Formal School, they may attend additional formal courses based upon the needs and interests of the school.

(2) All Formal School personnel must be trained on MCISD/SATE and RM as part of the SFDP or via DL (if available) within 30 calendar days of assignment.

b. <u>New instructor orientation and certification</u>

(1) Orientation sessions. This could include administrative, logistical, and welcome aboard considerations, as well as orientation seminars, training courses, and teaching practicums centered on techniques, policies, procedures, and the educational philosophy for that school. The orientation instruction should also include and provide command emphasis on standards of conduct of instructors and reinforcement of policies regarding hazing and Sexual Assault Prevention and Response (SAPR).

(2) Marine Corps Leadership Development. Lejeune Leadership Institute (LLI) – a department of MCU - developed and tested a leadership iniative to replace the 2006 Marine Corps Mentoring program. Future policy will provide the requirement for commanders to issue unit orders and incorporate six areas of leadership development (Fidelity, Fighter, Fitness, Family, Finances and Future) into their unit's training plan and battle rhythm. Additional information can be found at https://www.mcu.usmc.mil/sites/leadership/SitePages/main.aspx.

(3) Certification. This will vary amongst the Formal Schools, but should include the periods below. The outcome of this phase is to have certified instructors through a validated professional development program.

(a) Introductory period. During this period, the focus of new instructors is on gaining knowledge of the processes within the Formal School, observing classes, and even assisting in the preparation and delivery of courses, prior to taking a lead role.

(b) Assisted Period. During this period, the new instructors are led by experienced instructors and coached in ways to improve their method and technique. The focus is on preparing the new instructor to take more of a role of leadership in instruction. During this period, new instructors should undergo a process of peer and staff review of their performance. This will provide feedback that will allow the new instructor the opportunity to reflect and make changes where necessary before becoming validated as a certified instructor.

(c) Validation Period. During this period, each Formal School shall have a validation period in which they certify their instructors. This can be a combination of reviews, performances, and a culminating event, but is flexible to the needs and abilities of the Formal School. Schools may leverage personnel from the Marine Corps Train the Trainer (T3) School in addition to MCU Faculty Advisors, as necessary, for assist visits.

c. <u>Continuing Professional Development</u>. Formalized training and education requirements provide the skills necessary for a faculty member to fulfill a position. Continuing professional development is of the utmost urgency to the school in order to improve methods and practices; sustain requirements; and find efficiencies that will ultimately drive to mission

success of the school.  The adoption of the Marine Corps Instructor Mastery Model (IMM) utilized in the development of the Train the Trainer (T3) T&R Manual has laid a foundation for the professional development of a staff and faculty member.  The Key Performance Areas (KPA) that are identified in the IMM are the ten areas that the continuing professional development centers around.  Each SFDP should be adaptable to the school and address the KPAs identified in the IMM in order to successfully develop Academic Faculty and Support Personnel.  Additional information can be found in reference (c), Chapter 3 (Adult Learning) and Appendix D (Online Resources).

      (1) <u>Instructional Technique</u>.  Knowing and applying a variety of methods and strategies to secure student attention, enhance student participation, facilitate learning, and the ability to select and adapt approaches based on learning goals and the student population.

      (2) <u>Setting the example</u>.  The mental, physical, and character traits of an individual who embodies USMC values and ethos, demonstrates professionalism and command presence, garners respect and trust, and displays passion and commitment to the job.

      (3) <u>Communication and delivery</u>.  Clear, concise, dynamic and interactive exchanging of information to transfer knowledge and promote understanding using a combination of verbal, nonverbal, and other communication approaches.

      (4) <u>Self-improvement</u>.  The motivation to continually increase domain knowledge and enhance instructor skills by actively seeking and engaging in a variety of knowledge and skill acquisition activities.

      (5) <u>Developing subordinates and peers</u>.  Establish relationships with students and peers to mentor, coach, advise, and guide their development.

      (6) <u>Planning and Preparation</u>.  Review, generate, and adapt teaching materials to rehearse instructional delivery and proactively plan the administration and logistics of a course based on learning objectives, the role of the course within the institution's progression of instruction, and anticipated student characteristics and questions.

      (7) <u>Learning environment</u>.  Establish and maintain the conditions for a respectful, engaging, and motivating atmosphere that encourages active collaboration by managing time, physical space, and student behavior.

      (8) <u>Assessing effectiveness</u>.  Know and apply formal and informal assessment techniques to gauge the effectiveness of the instruction, accurately verify student knowledge, and provide performance feedback to students.

      (9) <u>Subject matter expertise</u>.  Maintain technical and tactical proficiency in course content and associated principles to be regarded as a credible source of information and apply that knowledge and experience to facilitate learning.

      (10) <u>Community of practice</u>.  Actively contribute to enhancing the collective body of instructional expertise, examine organizational practices and processes to achieve desired learning outcomes or objectives, and socialize recommendations for improving institutional and service-wide methods to meet USMC standards.  For civilian staff and faculty, this should

include participation in the Community of Interest (COI) sponsored by TECOM for those individuals assigned to 1700 billets.  Also, where possible, attend professional conferences, seminars, and symposia.  CO/OIC/DIRs should consider professional development when prioritizing TAD funds for the year. NOTE: These must be authorized and in compliance with reference (n).

3.  <u>Faculty Records</u>.  All Formal Schools must maintain records for each faculty member (civilian and military; instructors, curriculum developers, FSAs, and other staff designated for providing formal instruction) documenting completion of required courses and other associated requirements. For specific guidance on how EDCOM maintains faculty records, refer to the MCU Academic Regulations and Faculty Handbook.  For specific guidance on how MAWTS-1 maintains faculty records, refer to "MAWTS-1 Academic Standards, Processes and Procedures".  For all other Formal Schools, faculty records will contain at a minimum:

    a.  <u>Computer Based Training (CBT)</u>.  As noted in Chapter 1, all Formal School personnel are required to complete MCISD/SATE and RM training within 30 calendar days of assignment.  Faculty records must identify that this training has been conducted for each faculty member (e.g. certificate, memorandum).

    b.  <u>Course completion certificates</u>.  This should include formal and informal training to include external workshops or professional development that personnel may have attended.

    c.  <u>Designation letters</u>.  (e.g. FSA, Academics Officer, Course Chief, Chief Instructor, Instructor).

    d.  <u>Semiannual Instructor Evaluations</u>.  Instructors and Faculty Advisors will be evaluated every six months using a local Formal School Instructor Evaluation Checklist (IEC).  When evaluating faculty, it is recommended that considerations are made to assess specified designations, counseling session documentation, attendance rosters for faculty development training, platform hours, and contact hours.

    e.  <u>Instructional Rating Forms (IRFs)</u>.  Instructors will be evaluated using a local adaptation of the IRF, which will be maintained by the respective Course Chief.  It is recommended that when developing the IRF, considerations should be made for both student learning and instructor delivery.  For pilot courses or validation courses, Formal Schools may find it beneficial to issue IRFs to a larger cross-section of the TPD.

    f.  <u>Hazing/SAPR</u>.  Annual sustainment of hazing and SAPR will be annotated in every staff and faculty training record.

    g.  <u>Background check</u>.  In accordance with reference (o), persons selected for duties in connection with formal programs involving the education and training of military or civilian personnel must have a favorably adjudicated National Agency Check with Local Agency Check and Credit Checks (NACLC) or Access National Agency Check with Written Inquiries (ANACI) prior to assignment.  This requirement applies to those assigned to formal programs and does not include those incidentally involved in education and training. It also does not apply to teachers or administrators associated with university extension courses conducted on DON installations in the U.S..

h.  <u>High Risk Training Instructor</u>.  Certified individuals must provide the appropriate documentation to include in the faculty record.  Amplifying information can be found in Appendix D.

4.  <u>Recognition</u>.  The work of personnel within a formal school often goes unnoticed.  They spend countless hours outside of academic and administrative time with students, mentoring, coaching, and counseling them to be better.  Within each SFDP, there should be a portion of the program dedicated to recognition of outstanding efforts in staff and faculty duties.  It is up to the schools to define the requirements for recognition, but should give consideration to personnel's performance on the job, passion for transferring knowledge, and efforts by the individual to further develop in their position.  As they occur, these recognition efforts will be raised to HHQ for consideration of command and service-level awards.  These will be routed respectively via Training Command or Education Command, then recognition will be given at the Training and Education Command level.

CHAPTER 4

EVALUATION

1. <u>Introduction</u>.  Evaluation requirements vary from school to school based on the school's mission and desired endstate.  For specific guidance on how EDCOM conducts the evaluation process, refer to "Chapter Three: Curriculum Review Process" of the MCU Academic Regulations.  For specific guidance on how MAWTS-1 conducts the evaluation process, refer to "MAWTS-1 Academic Standards, Processes and Procedures".

2. <u>Commanding General's Inspection Program (CGIP)</u>.  Formal Schools will be inspected by the TECOM CGIP every two years in accordance with reference (p) and the FAC 400 checklist.  Formal Schools will ensure Academic SOPs support policy to meet the requirements of the FAC 400 checklist.  Current FAC checklists are updated regularly and are available through the IGMC Marine Corps website at:
http://www.hqmc.marines.mil/igmc/Resources/FunctionalAreaChecklists.aspx.

3. <u>Formal School Evaluation Plan (FSEP)</u>

   a. <u>Intent</u>.  The intent of evaluation in any Formal School is to determine the effectiveness of a course.  CO/OIC/DIRs are required to conduct course evaluations on an ongoing basis as part of the school's overall FSEP. The FSEP is based on a three-year cycle and coincides with the CCRB Battle Rhythm codified later in this Chapter.

   b. <u>Purpose</u>.  The purpose of evaluation is to identify potential improvements to courses by:

      (1) Validating and assessing course content and course material.

      (2) Assessing student performance.

      (3) Evaluating instructor performance.

      (4) Assessing the learning environment.

4. <u>Continuous Evaluation</u>.  Evaluation occurs in all phases of ADDIE and is conducted in accordance with reference (c).  Formal Schools shall have an established external evaluation plan to gauge course effectiveness.  Formal Schools conduct evaluations on an ongoing basis by collecting data from:

   a. Students (Learning outcome assessments, Student course surveys, 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) – consistently monitored by designated staff.

   e. Course Instructors (After Instruction Report).

   f. Staff and faculty (Faculty course surveys, IRFs, other data inputs).

g. Operating Force (Field Surveys).

h. Safety Investigation Reports, HAZREPS, mishap lessons learned available through CMC (SD).

5. POI Evaluation Cycle. Figure 4-1 is a graphic representation of what is taking place during the POI Evaluation Cycle. The focus and first priority of the CCRB should be to address agenda items derived from analysis of formative and summative data (e.g., IRFs, AIRs, ECCs, and Field Surveys of students in the OPFOR). This is the bedrock of the Formal School evaluation process. The CCRB presents and votes on agenda items derived from analysis of data to make course adjustments.
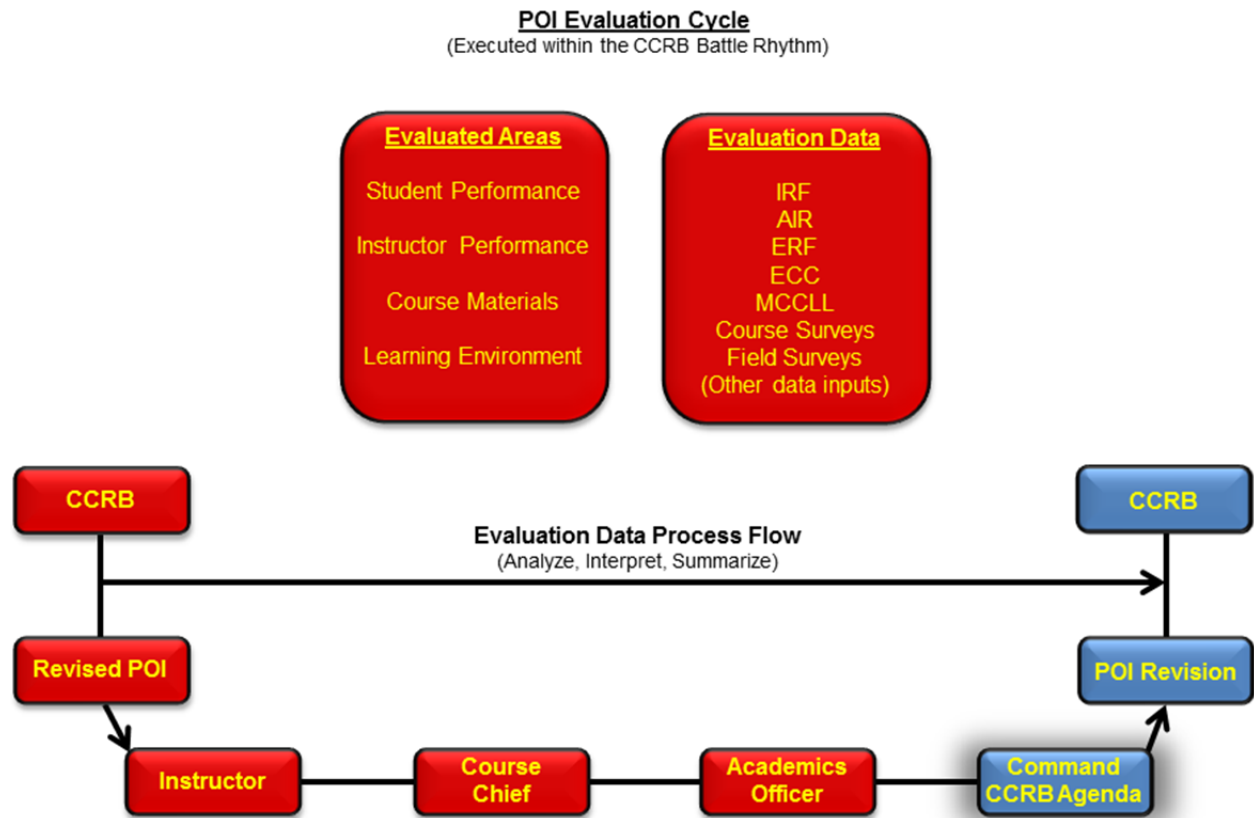


Figure 4-1.--POI Evaluation Cycle

6. Course Content Review Board. To collect, review and validate course content using data inputs from formative and summative evaluation data. The CCRB begins and ends the evaluation process for a given course. CG TECOM requires formative and summative data to be maintained until the conclusion of the next TECOM Directed CCRB, which is every three years according to the CCRB Battle Rhythm.

a. CCRB Battle Rhythm. The Formal School, in concert with the assigned TA, will formulate a plan that outlines a POA&M for all CCRBs to include POI submission. Every three years, this POA&M will need to be validated and, if necessary, resubmitted to the appropriate CG for approval. The submission process is as follows:

        (1) The Formal School will conduct a review of all CCRBs and associate timelines to them.

        (2) The CCRB timelines will be codified into a POA&M that provides the month and year that a specific CCRB will take place.

        (3) CO/OIC/DIR will review, endorse, and forward the POA&M to the appropriate HHQ for staffing and approval by the CG.

        (4) Once approved by the CG, MTESD Ops will use the approved POA&M to inform tracking processes within the respective headquarters.

    b.  Figure 4-2 is a graphic representation of what is taking place during the three year CCRB Battle Rhythm.
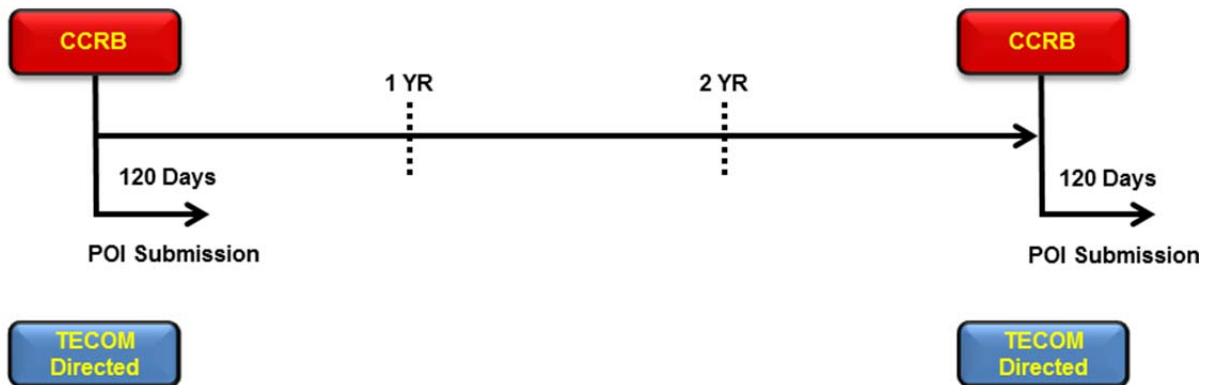
Figure 4-2.--CCRB Battle Rhythm (3 Year Cycle)

    c.  Figure 4-3 provides a generic example of the implementation of the CCRB and illustrates how a Formal School can align their battle rhythm anywhere in the T&R cycle.  Upon approval of a T&R, if a school chooses to conduct a post T&R review to discuss and codify recommended changes, then it has the ability to do so - but that is not the function of a CCRB.  For POI revision, Chapter 1, para 4.a.(5) explains the process for submitting POI change documents to MTESD OPS.
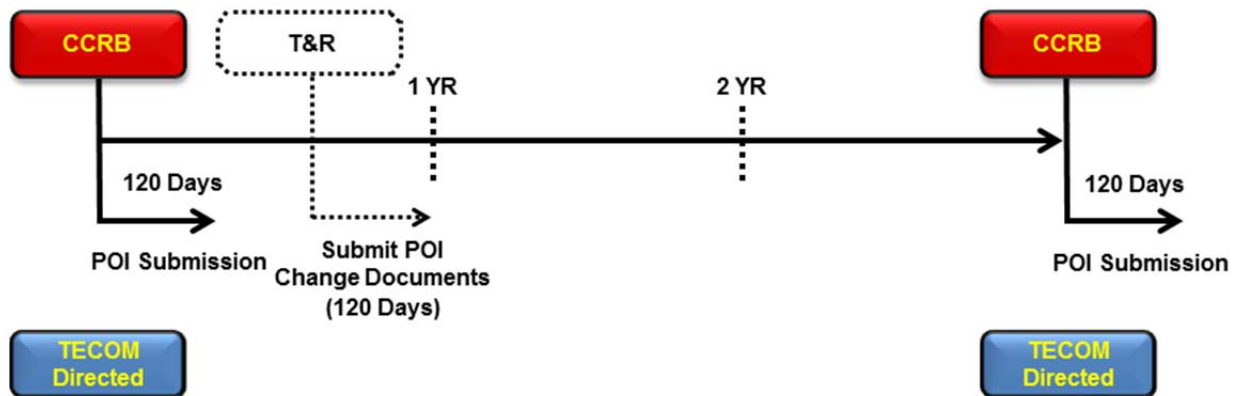
Figure 4-3.--CCRB Battle Rhythm (Generic Example)

d. <u>TECOM Directed</u>.  CCRBs are planned and conducted for each course of instruction or sub-course within a curriculum, at a minimum, once every three years.  They are based on a POA&M approved by the Formal School's respective POI approval authority and focused on agenda items derived from formative and summative data.  T&R event composition shall not be identified as an agenda item.  The POI change package will be submitted to MTESD Ops section via the following email address:  TECOM.MTESD.OPS@USMC.MIL for appropriate staffing.  Refer to Appendix C for refined guidance on review of CCRB preparation.  A CCRB will accomplish, at a minimum, the following:

      (1) Review HHQ policy for changes or direction which affects the POI.

      (2) Review empirical data to assign as agenda items from evaluation data (formative, summative).

      (3) Validate applicable T&R Task List/Learning outcomes.

      (4) Review POI (e.g. CDD, Concept Cards, Student Performance Evaluations) for recommended lesson or course additions/deletions/modifications to instructional materials.

      (5) Review test items.

e. <u>Command Directed</u>.  Occurs when a T&R has been in use for some time and has been validated by POI execution.  During this CCRB, a T&R change can be recommended via the out-of-cycle formal change process.  It is similar to a TECOM directed CCRB, except the scope is limited to changes that are not T&R or resource related.  Nothing in this directive precludes a Formal School from conducting any number of Command Directed course reviews during the three year CCRB Battle Rhythm.

f. <u>Record Of Proceedings (ROP)</u>.  The results of the CCRB are captured in the ROP and are used to aid revisions of POIs.  CCRB ROPs are an inspectable item during CGIPs.

      (1) The ROP is the only document that validates that a CCRB took place and will accompany the submission of the POI as support and justification of the contents.  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.

      (2) MCU Directors will ensure the ROP is documented and forwarded annually with the Director's Report to the Director, Institutional Research, Assessment, and Planning (IRAP).  In this case, the record shall include the educational program director's decisions and recommendations relevant to modifying the curricula identifying any substantive changes that may be needed in accordance with policies from external accrediting bodies and based on analyses of the data related to student achievement of the approved learning outcomes conducted by the faculty and administrators.  More information on MCU processes can be found in the MCU Academic Regulations.

g. <u>Members</u>.  Reference (c) provides a recommendation for composition of the CCRB.  While the CCRB, in conjunction with a well-executed FSEP, garners extensive OPFOR/supporting establishment feedback on POI inputs and outputs,

Formal Schools **should** invite SMEs from the following organizations to participate, as available, in CCRBs:

      (1) Operating Force (Must attend as the Operating Force is the target audience for the CCRB).

      (2) OccFld Manager.

      (3) TECOM TA (to the maximum extent possible).

         (a) TAs should attend at least one CCRB at each of their Formal Schools/Dets annually, resources permitting.

         (b) The school and the TA should collaborate to decide whether the TA will be a voting or non-voting member in the CCRB.

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

   h. <u>Funding</u>.  It is the CO/OIC/DIR's responsibility to fund the cost of travelers.  If the Formal School has a requirement for additional funding for CCRBs, it should be requested through the normal process identified in Chapter 5.

   i. <u>Joint CCRBs</u>.  If a specific TECOM MSC owns mirror-imaged POIs where all of the mirror-imaged schools belong to the same MSC (e.g. Sniper school) or for courses taught at multiple locations that include multiple MSCs (e.g. Marksmanship, MCCWS, MCMAP), the mirrored schools will submit the POIs simultaneously and therefore require a Joint CCRB.  In these cases, representatives from all Formal Schools or training venues that teach the respective course(s) will be convened to ensure curriculum content remains consistent between course locations.

CHAPTER 5

PLANNING, PROGRAMMING, BUDGETING, AND EXECUTION (PPBE) PROCESS

1.  Introduction.  The following information is provided to enable Formal
Schools to better participate in the PPBE process within 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
CO/OIC/DIR may request resources at any time throughout the year, a basic
understanding of the PPBE process will better enable the acquisition of
necessary resources to adequately support both existing and future POIs.  The
Formal School financial plan incorporates the PPBE into its process.  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 affect the next fiscal year.

2.  School Descriptive Data (SDD).  A significant upgrade to the Curriculum
Management Development Module (CMD) has been conducted in MCTIMS to better
support the PPBE process.  This upgrade will give the Formal School staff and
the higher headquarters staff, better visibility and thus better management
of overall resource requirements for specific POIs and Formal School
overhead.  The SDD will capture a roll up of POI resource requirements and
Non-POI resource requirements for the Formal School.  In order for the higher
headquarters resource management functionality to be properly developed and
validated, all Formal Schools must populate the required information in the
CDD(s) and SDD.  This manual requires that all Formal Schools and Training
Detachments immediately begin to populate the required information in MCTIMS
CMD.  All Training Detachments will be required to submit the SDD to capture
detachment overhead costs.

3.  Planning Phase.  The Formal School financial plan incorporates PPBE.  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 affect the next fiscal year.  Much of the data provided to inform
the Formal School financial plan will come from the School Descriptive Data
(SDD) identified in MCTIMS CMD module.  Figure 5-1 identifies the Data
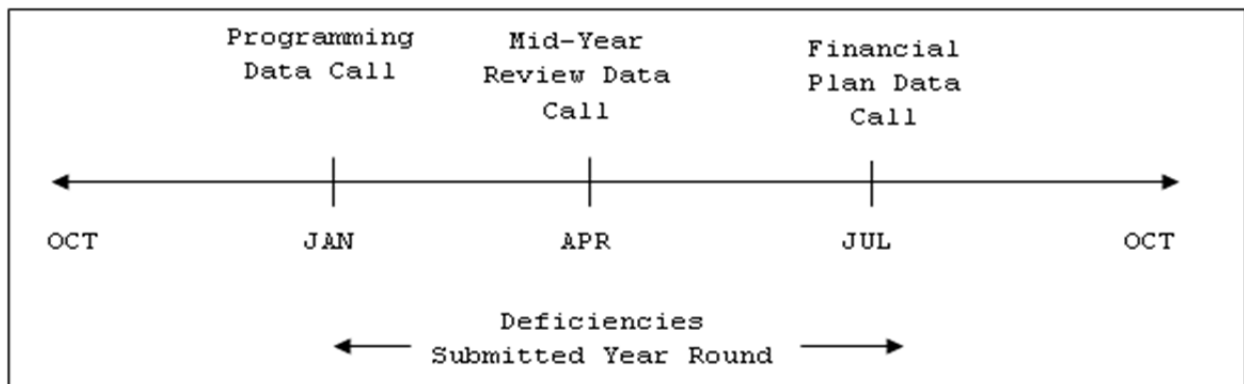Submission Timeline for TECOM.



Figure 5-1.--Data Submission Timeline

4.  Programming Phase

    a.  TECOM staff and subordinate commands will use the following procedures for submitting budgets and engaging the POM process.

        (1) Programming activities are conducted annually with the development of the service POM.  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 1st Quarter/beginning of the 2nd quarter by the TECOM G-8.  CO/OIC/DIRs and activity heads will develop and identify initiatives detailing additional funding required to execute their mission.

        (3) TECOM 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) 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.

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

5.  Budgeting Phase

    a.  Annual Financial Plan.  The annual Financial Plan is the vehicle for all of TECOM 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 headquarters divisions, branches, and activities forward financial plans directly to TECOM Comptroller.

        (2) TECOM Major Subordinate Commands (MSCs) will submit their financial plan information directly to the TECOM Comptroller (to include subordinate unit requirements).

        (3) TRNGCMD Formal Schools and TRNG DETS will submit their financial plan information directly to the CG TRNGCMD G-7.

(4) EDCOM Formal Schools will submit their financial plan information directly to the CG EDCOM G-7.

b. Funding Deficiencies. Unfunded deficiencies will be submitted to TECOM 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 Formal School. To this end, all Formal Schools will review all CDDs when preparing their annual submissions.

(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) Other deficiencies

(a) Manpower. T/O deficiencies will be addressed by submitting a TOECR through the Total Force Structure Management System (TFSMS). All TOECRs will be submitted to CG TECOM via TECOM MTESD OPS and the G-1 for TECOM MSCs, via EDCOM for EDCOM Formal Schools, and via TRNGCMD for TRNGCMD Formal Schools and Training Detachments.

(b) Logistics Support. For Formal Schools 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 Table of Equipment will be submitted as appropriate to CG in the chain of command via TECOM MTESD OPS and TECOM 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 base facility offices.

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

6. Execution Phase

a. Once funding is provided through an Appropriation Act, funds are apportioned (i.e., annual amount is broken into quarterly amounts) by the Office of Management and Budget (OMB) and sent to the Office of the Secretary of Defense (OSD). OSD will pass Marine Corps funds via the DON. Once funds are received, authority is loaded into SABRS and distributed. Once commands receive funds, they commit, obligate, expense, and liquidate funding based on each source document created and processed to obtain required goods and services.

b. Additional Support

(1) CDET will manage and maintain a service level learning management system (e.g. MarineNet) to support DL requirements for entry-level, MOS, and by-grade professional development based on approved T&R events and/or

learning outcomes.   These materials will be based on T&R events/learning outcomes developed for a specific MOS or PME course.

(2) CO/OIC/DIRs that require Combat Camera equipment support must coordinate and submit written request for support and resources from local Combat Camera personnel.

(a) When requirements cannot be filled by the local Combat Camera unit, that Combat Camera unit will request assistance from CG TECOM (C 466 MTESD).

(b) For Formal Schools not co-located with Combat Camera personnel, requests for assistance will be forwarded to the host Commander in accordance with appropriate interservice agreements, per reference (q), and other governing directives.

(3) 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.

(a) CO/OIC/DIRs will forward requests for contractor support, with detailed justification, to CG TRNGCMD G-7, or CG TECOM (C 466 MTESD).

(b) Courseware developed by contractors, including CBT, must be developed under the guidance of reference (c).

(4) TECOM Formal Schools Training Support (FSTS) - formerly known as World Wide Travel - is authorized in accordance with reference (r). Additional issues pertaining to FSTS should be directed to TECOM G-8.

CHAPTER 6

ADMINISTRATION AND OVERSIGHT


1.  Introduction.  This section provides an overview of current web-based management tools as well as critical guidance for RM and the safeguarding of sensitive information.

2.  Management Tools

    a.  Marine Corps Training Information Management System (MCTIMS)

        (1) Purpose.  Per reference (a), all Formal Schools will use applicable MCTIMS functionality in the performance of schoolhouse functions. As identified in reference (s), MCTIMS is the Marine Corps enterprise integrated, automated web-based, multi-user system that supports individual and unit training throughout the Total Force.  It consists of a suite of Modules representing separate but interrelated capabilities.  More than a Learning Management System, MCTIMS will fully integrate the entire training and education continuum of both individual Marines and Marine Units from the Fire Team to the Marine Expeditionary Force and stands as the Marine Corps' authoritative database for the execution of MCISD/SATE.  EXEMPTION: MAWTS-1 will only be required to submit section I of CDD.

        (2) Capabilities.  MCTIMS capabilities enable the management of curricula for all Marine Corps Formal Schools in addition to tracking quotas, courses, and the assignment of personnel to attend these courses.  Internal to the Formal Schools, MCTIMS supports the reporting, tracking and rostering of not only Marine Corps students, but students from other services.  In addition to being the Formal School's primary tool for execution of all elements of the MCISD/SATE process, MCTIMS provides capabilities tailored to managing training throughout the Marine Corps.

            (a) Ensure students meet the prerequisites for attendance of their school as codified in the TPD in the POI.  If students do not meet the prerequisites, Formal School CO/OIC/DIRs may return students to their respective command.

            (b) Submit validated class convening rosters, through MCTIMS Formal School Personnel Management module, to CG TECOM (C 466 FSQRMB) within (5) calendar days of the class beginning date.

            (c) Submit validated student and class data (i.e. assign course completion codes, validate classes), using the MCTIMS Student Registrar, within (7) calendar days of course completion.  When course completion codes have been assigned and the class is validated in Student Registrar, MCTIMS automatically sends course completion data to MCTFS, and where applicable MCTFS assigns the graduate the appropriate MOS.

            (d) For courses with other service course numbers (OSCN), ensure the validated student and class data contained in MCTIMS matches the student and class data contained in the applicable other service training management system (e.g. ATRRS, CeTARS, OTA).  For example, a validated class roster in MCTIMS must contain the same student and class data as reported in ATRRS for any course that has an Army OSCN.

(e) Class schedules for POIs conducted at Marine Corps Formal Schools will be submitted via the MCTIMS Student Registrar Scheduling module per the schedule submission direction provided in the CG TECOM cover letter to the approved Training Input Plan (TIP).  Schedules for POIs at sister service Formal Schools, but not managed in the sister service's training management system (i.e. schedules will not reside in ATRRS, CeTARS, or OTA) also will be submitted per the CG TECOM cover letter to the TIP.  Class schedules are based on the student input requirements published in the approved TIP and they must agree with the approved POI.

b.  <u>Marine Sierra Hotel Aviation Readiness Program (M-SHARP)</u>.  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).

c.  <u>The Blackboard Learning System</u>.  Blackboard is a software application used to power virtual learning environments, supplement classroom education and as a platform for distance learning programs.  It features a robust core set of capabilities that enable instructors to efficiently manage courses, author content, create assignments, and foster collaboration.  Among other key functions, Blackboard helps institutions accomplish mission-critical objectives related to instruction, communication, and assessment.  These key capabilities include course management, syllabus building, learning unit construction, online textbook content, teaching and learning tools, personal information management, discussion boards, virtual classroom/collaboration tools, group projects, assessments, surveys, assignments, gradebooks, and a reporting performance dashboard.

3.  <u>Safeguarding Personally Identifiable Information (PII)</u>.  PII is any information or characteristics that may be used to distinguish or trace an individual's identity, such as their name, Social Security Number, or biometric data.  MCTIMS is an enterprise system that contains information on Marines, Civilians and other service personnel and goes to great lengths to protect the PII 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 PII in accordance with reference (t).  All MCTIMS users are directed to adhere to the following.

a.  All PII related information will be treated as 'FOUO' and safe guarded accordingly.

b.  Reduce and/or eliminate localized copies or duplication of MCTIMS PII data.

c.  Any downloaded or exported PII data from MCTIMS must be safeguarded against unauthorized access or spillage.

d. It is not authorized for any MCTIMS user to maintain localized duplicate MCTIMS data on a personal computer or share with other personnel MCTIMS data.

e. Any PII data that is to be imported into MCTIMS must be deleted from the local computer after successful import into MCTIMS.

f. Any user who prints a report from MCTIMS that contains PII is responsible for the safeguarding of said report(s).

g. Electronic Data Interchange Personal Identifiers (EDIPI). Reference (u) requires the removal of Social Security Numbers (SSN) from MCTIMS and user interfaces. These personal identifiers will be replaced with EDIPIs in order to reduce sensitive data from being received by, stored in, or transmitted from MCTIMS. EDIPI is a unique number that is associated with a CAC. In accordance with reference (v), MCTIMS has moved to the use of DoD ID EDIPI for individual identification instead of SSNs. There are, however, instances where some MCTIMS users will need to access SSNs through MCTIMS. As a result, users will be able to receive privileged access to use the DoD ID (EDIPI) Lookup tool, once they have applied and been approved for additional rights by the appropriate Module's Functional Manager. For additional information on allowable uses of SSNs within MCTIMS, refer to reference (s).

4. <u>Training Safety</u>

a. <u>Risk Management (RM) in the Formal Schools</u>

(1) RM is a process that enables CO/OIC/DIRs to plan for and minimize risk while still accomplishing the mission. CO/OIC/DIRs must comply with the processes detailed in references (w) thru (cc) when designing, developing, implementing, and evaluating POIs. CG TECOM retains the responsibility for oversight of RM in the Formal Schools and detachments and for ensuring ORM considerations are addressed during the analyze phase of ADDIE.

(2) All CO/OIC/DIRs will apply RM during the Design, Develop, Implement, and Evaluate Phases of ADDIE. RM requirements for training will be built into the curriculum during the Develop Phase. A Risk Assessment (RA) will be conducted for each lesson in the POI and the associated RM tools will be incorporated and reviewed in the MLFs on a yearly basis. The CO/OIC/DIR will conduct a risk assessment and determine cease training criteria and procedures for each lesson. During the Implement Phase, CO/OIC/DIRs 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. RM 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) RAWs are critical and shall be updated, at least annually, based upon complete reviews of the lesson or more frequently based on changes that impact the overall risk to injury, loss of life, or significant damage to equipment. All lessons will have a current and signed RAW located in the MLF. EXEMPTION: MAWTS-1 is staffed with a Department of Safety and Standardization (DSS) and therefore is not required to have a RAW located in each MLF.

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

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

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

(7) Investigate and report all training related mishaps in accordance with reference (z).

(8) Determine if a course meets the criteria to be designated HRT as prescribed in Appendix D. CG TECOM will coordinate with CMC (SD) for a written safety assessment of the HRT before approval and inclusion to the HRT courses at Formal Schools.

(9) Submit Serious Incident Report (SIR) via Chain of Command to CG TECOM per reference (bb).

(10) All Formal Schools faculties will complete RM training through the local SFDP. This training, combined with the RM instruction provided in the resident T3S courses will enable faculty to fully institute the RM process in their schools.

b. RM Process Training in Formal Schools

(1) Entry-Level Primary MOS Courses. CO/OIC/DIRs will train all entry-level students in Primary MOS courses to apply the RM process to both on-duty and off-duty events. The training may be integrated within lessons; may be presented as stand-alone, RM-specific "lesson purpose" period of instruction using TECOM or locally prepared training materials; or may be accomplished before graduation by having students complete the Initial Risk Management training taught by a Risk Management Instructor per reference (w).

(2) RM Prior to Liberty. CO/OIC/DIRs will provide liberty-specific Force Preservation RM training to students and staff prior to executing special liberty, leave, PCS, and periods of liberty greater than 72 hours, per references (w) and (x). In addition, the completion of Holiday Accident Reduction Program (HARP) forms, vehicle inspections, and trip planning review by supervisors is also required, per reference (cc). When feasible, the training will include a practical exercise requiring students and staff to complete an RAW for their planned activities, and the worksheets will be reviewed by the instructor or unit leader. CG TECOM maintains a standardized RM class for use by all schools, but local modification is at the discretion of the CO/OIC/DIR.

c. High Risk Training (HRT). CG TECOM will review and approve the HRT criteria for designated coures. Appendix D provides the designation process. EXEMPTION: MAWTS-1 WTI flight phase is considered high risk, however MAWTS-1 is exempt from the requirements of Appendix D due to established internal policies for risk management and mitigation through the MAWTS-1 Department of Safety and Standardization (DSS).

APPENDIX A

COURSE DESCRIPTIVE DATA (CDD)

| **COURSE DESCRIPTIVE DATA (CDD)** |
|---|
| **DESCRIPTION:** CDD is contained in Section 1 of a Progrram of Instruction (POI) located within MCTIMS. It documents course description, resource requirements, and justification for the development or refinement of formal Programs of Instruction (POI) taught at Marine Corps FLCs. It is the key document for all TECOM activities involved in the resourcing process. |
| **A. COURSE DESCRIPTIVE DATA.** |
| 1.  COURSE TITLE. |
| 2.  LOCATION. |
| 3.  COURSE ID. |
| 4.  OTHER SERVICE COURSE NUMBER. |
| 5.  MILITARY ARTICLES AND SERVICE LIST NUMBER (MASL). |
| 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. TARGET POPULATION DESCRIPTION/PREREQUISITES. |
| 17. MOS RECEIVED. |
| 18. OCC FIELD. |
| 19. FUNDING. |
| 20. REPORTING INSTRUCTIONS. |
| 21. INSTRUCTOR STAFFING REQUIREMENTS. |
| 22. SCHOOL OVERHEAD REQUIREMENTS. |
| 23. TRAINING/EDUCATION SUPPORT REQUIREMENTS. |
| 24. TASK LIST. |
| **CDD NOTES:** |
| |

APPENDIX B

COURSE IDENTIFIER (CID) ESTABLISHMENT POLICY


1. <u>Introduction</u>.  This appendix refines the definition of a CID contained in the annually published TIP and identifies all the specific uses of the CID for Formal Schools employing TECOM information management tools.  Further, this Appendix identifies the circumstances under which a CID will be issued, and identifies the conditions under which an established CID will be deactivated.

    a.  A CID is the service-level alphanumeric code for a specific, formal course of instruction.  The CID is integral and inseparable from courses taught at an Formal School.  Until now, there has been no single, coherent policy to capture the characteristics of courses requiring CIDs or to describe how the CID is to be employed by the Formal School, higher headquarters, and the operating forces.

    b.  CIDs will be employed to support formal courses of instruction complying with the guidance specified in this NAVMC.  CIDs will only be established for courses that comply with this NAVMC and CIDs for existing, noncompliant courses shall be deactivated in the Marine Corps Training Information System (MCTIMS) database.

    c.  All courses with CIDs for training or educating Marines have seven characteristics, and there are five actions that must occur for every course with a CID, as detailed below.

2. <u>Eligibility Characteristics for CID Assignment</u>

    a.  <u>Based on a Training and Readiness (T&R) Manual or Official Marine Corps Directive</u>.  Per chapter 1 of this NAVMC, the course must instruct individual events or outcomes captured in an approved Marine Corps Training and Readiness (T&R) Manual or Official Marine Corps Directive (Marine Corps Order or NAVMC).

    b.  <u>Developed in Accordance with Training Policy</u>.  The course of instruction has been developed according to the procedures identified in this NAVMC and reference (c).  It has been reviewed and validated by Marine Air-Ground Task Force Training and Education Standards Division (MTESD) and approved by CG TECOM or at CG TECOM's direction by either CG Training Command or CG Education Command in accordance with reference (a).

    c.  <u>Taught at a Formal School or in the context of a Formal School resourced Mobile Training Team (MTT)</u>.  The course is conducted in a designated Marine Corps Formal School with training facilities and instructor personnel provided by the Marine Corps; or conducted by an other-service school established in the other-services' training management systems; (e.g. ATRRS, Navy CeTARS, or Air Force Oracle Training Applications (OTA) or in the context of an MTT.

    d.  <u>Presence of a Course Descriptive Data (CDD)</u>.  The course's POI is created in MCTIMS Curriculum Management module, or if the course is an other-service course, there is course data from the other service supplemental CDD submitted to CG TECOM MTESD.

e.  Homogenous Population.  The target population of the course is homogenous.  A homogenous student population meets one or more of the following criteria:

(1) For PME: all students in one course are either officer or enlisted of similar grade.

(2) For training courses: all students have the same MOS, with the exception of the Warrant Officer Basic Course, CID: M02RMN4, a course designed to bring together former enlisted Marines of various primary MOSs for basic officer training.

(3) For training courses: all graduates will be awarded the same MOS or will proceed to another course in the training track for an MOS or other certification.

f.  Fits into a Category.  The course falls into one of the categories listed below:

(1) Specialized skill training, including initial skill training, leading to assignment of a MOS which is considered as required training per reference (k).

(2) Follow-on specialized skill training to maintain or enhance proficiency in an occupational field/MOS which is considered as skill enhancement training per reference (k).

(3) Resident PME.

(4) Functional training required to support specific billet requirements.

g.  Has a Formal School Quota Requirement Sponsor.  The course must have one or more Formal School Quota Requirement Sponsors identified in Appendix C of the annually published TIP.

3.  Five Requisite Actions to Sustain a CID.  TECOM major subordinate commands and Marine Corps requirement sponsors with an interest in utilizing TECOM-validated formal school training are required to ensure all necessary CID-related actions are taken by the organizations over which they have cognizance.  Failure to take all actions will result in CG TECOM MTESD deactivating the CID.

a.  Submit TIP Requirements.  Requirement sponsors must submit TIP requirements for every course with a CID to CG TECOM MTESD in response to the TIP Requirements messages promulgated in accordance with the annually published TIP.

b.  Enroll Every Student.  Formal Schools must ensure every student who reports to a course is enrolled in the appropriate school seat, per chapter 2 of this NAVMC.

c.  Report the Disposition of Every Student.  Formal Schoolss must report the disposition of every student enrolled per subparagraph 3.b. above, either through graduation or disenrollment, regardless of reason, and validate every class, as required in Chapter 2 of this NAVMC.

d.  Submit an Updated/Revised POI or CDD.  Formal Schools will submit a POI or other service supplemental CDD for every course with a CID, to CG TECOM.

e.  Post Course Materials.  Formal Schools will post all course materials to the MCTIMS Training Resource Module.

4.  Travel Funding Requirement.  The TECOM G-8 FSTS branch will only fund student travelers to courses with CIDs.  In addition to the TIP requirement for the course mentioned in paragraph 3.a. above, the student must have a valid registration in MCTIMS Student Registrar under a Student Type Code eligible for TECOM travel funding, and there must be sufficient funds available to support the travel.  FSTS will not fund other student travelers.

5.  Circumstance Under Which a CID Will NOT Be Issued

a.  As noted in the annually published TIP, the following types of training are not eligible for a CID under the requirements contained in this NAVMC: unit training, field skill training, and managed on-the-job training, any other annual or ancillary training requirement conducted at a base or station, or other collective or unit training environment.

b.  Should CG TECOM MTESD determine that a submitted course does not meet the criteria for the assignment of a CID, the Director will provide the requesting unit with one or more alternatives to accomplish the requesting unit's requirements.  Generally, this alternative will include recommending the requesting unit contact Headquarters Marine Corps Manpower Information for one of the various training codes that are available within MCTFS in order to track training.

6.  Criteria for Deactivating a Previously Granted CID.  CG TECOM MTESD will permanently deactivate a CID when any of the following criteria are met:

a.  TIP requirements for a course are not submitted or published in two consecutive fiscal years (FY) (for example, the course has no requirements for the current FY or projected out years in the TIP).

b.  A Formal School fails to submit class schedules in MCTIMS Student Registrar over the course of an entire FY. This does not apply to schedules that fail to transfer to MCTIMS through established system interfaces with ATRRS, CeTARS, and OTA.

c.  A Formal School does not validate classes after completion in MCTIMS Student Registrar over the course of an entire FY.

d.  There were no registrations for the course in two consecutive FYs.

7.  Office of Professional Responsibility. Formal School Quota Requirements Management Branch (FSQRMB), MTESD, TECOM is the Office of Professional Responsibility for overseeing the execution and adjudication of the criteria contained in this appendix.

APPENDIX C

CCRB PREPARATION GUIDE

| COURSE CONTENT REVIEW BOARD (CCRB) PREPARATION GUIDE | | | |
|---|---|---|---|
| **Course:** | | | |
| **Observer/Title:** | | **Date:** | |
| **PURPOSE:** To collect, review and validate course content using data inputs from formative and summative evaluation data. | | | |
| **1.  REVIEW HHQ POLICY** | **YES** | **NO** | **N/A** |
| a. Review HHQ policy for changes or direction which affects the POI. | ☐ | ☐ | ☐ |
| **2.  REVIEW EMPIRICAL DATA** | **YES** | **NO** | **N/A** |
| a.  Instructor Rating Form (IRF) | ☐ | ☐ | ☐ |
| b.  Examination Rating Form (ERF) | ☐ | ☐ | ☐ |
| c.  After Instruction Report (AIR) | ☐ | ☐ | ☐ |
| d.  End of Course Critique (ECC) | ☐ | ☐ | ☐ |
| e.  After Course Report (ACR) | ☐ | ☐ | ☐ |
| f.  Test Matrices | ☐ | ☐ | ☐ |
| g.  Post Graduate Surveys (from students and supervisors) | ☐ | ☐ | ☐ |
| h.  Marine Corps Center for Lessons Learned (MCCLL)  information | ☐ | ☐ | ☐ |
| i.  <u>NOTE</u>: Reviewing empirical data begins immediately following the preceding CCRB.  It is an ongoing process of the Formal School Evaluation Plan.  As data sources are collected, they are evaluated, analyzed, and assigned as agenda items. This is the most important part of the CCRB. | | | |
| **3.  VALIDATE APPLICABLE T&R TASK LIST / LEARNING OUTCOMES** | **YES** | **NO** | **N/A** |
| a.  Was a thorough Learning Analysis conducted? | ☐ | ☐ | ☐ |
| b.  Did the Learning Analysis generate adequate ELOs to support the TLO? | ☐ | ☐ | ☐ |
| c.  <u>NOTE</u>: If a review of empirical data and the Learning Analysis uncover gaps in the building blocks of the TLO, further Learning Analysis may be conducted and additional ELOs may be developed and added to the Concept Card. | | | |
| **4.  REVIEW PROGRAM OF INSTRUCTION (POI)** | **YES** | **NO** | **N/A** |
| a.  SECTION I - 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 all Terminal Learning Objective(s) (TLOs) and Enabling Learning Objective(s) (ELOs).  TLOs are linked directly to the T&R event and need 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 collected on this Concept Card. | ☐ | ☐ | ☐ |
| 3.  Review any ammunition associated with concept card.  Ammunition is linked to a TLO and its associated doctrinal publication. | ☐ | ☐ | ☐ |
| 4.  Review any equipment/material associated with concept card.  Equipment/material is linked to a TLO and its associated doctrinal publication. | ☐ | ☐ | ☐ |
| 5.  Review the notes section ensuring they are current with associated training evolution. | ☐ | ☐ | ☐ |
| 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) were utilized for course development. | ☐ | ☐ | ☐ |
| **5.  REVIEW TEST ITEMS** | **YES** | **NO** | **N/A** |
| 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 relevance.  Test items are based on current doctrine. | ☐ | ☐ | ☐ |

APPENDIX D

HIGH RISK TRAINING

1. <u>Purpose</u>. 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, despite the presence of and adherence to proper safety controls, exposes students and instructors to the risk of injury, illness, death, or permanent disability; or property damage, damage to national or service interests, or degradation to efficient use of assets. To ensure Marines are ready for combat, the Corps must conduct physically challenging, demanding, stressful, and at times, dangerous training. The purpose of this HRT policy is to reduce the risk of death and serious injury to the lowest possible level during training. Refer to references (w) thru (cc) for amplifying information.

2. <u>HRT Formal School Designation</u>

   a. Commanders must request authorization from CG TRNGCMD (if the school is a TRNGCMD Formal School) or CG TECOM to include HRT events in a POI. The request will include the following elements:

      (1) RAW for the training events that would render the course high risk.

      (2) Justification as to why the high risk events are necessary to meet the course's training objective or to train to training and readiness event standards.

      (3) Description of the controls implemented to mitigate risk.

      (4) Additional resource requirements or other actions, if any, required to further reduce the risk. CMC(SD) will provide CG TECOM a written safety assessment of the training event within the POI in accordance with Chapter 6, paragraph 4.a.(8) of this order.

      (5) Based on the data provided with the request, CG TRNGCMD or CG TECOM will take one of the following actions:

         (a) Approve the POI containing the HRT events.

         (b) Require further analysis and additional actions be taken to further mitigate risk.

         (c) Provide additional resources to permit further mitigation of risk.

         (d) Disapprove the POI or prohibit execution of the HRT events based on the data provided with the request and assessment provided by CMC (SD).

   b. CG TECOM may designate, during bi-annually review, certain courses as HRT if training events meeting criteria are present.

   c. CG TECOM will provide CMC (SD) and annual update of HRT designated courses.

3. <u>HRT Instructor Screening</u>.  Formal School CO/OIC/DIRs are ultimately responsible for ensuring that HRT instructor candidates are screened for professional, physical, and psychological suitability.  This guide is intended to assist CO/OIC/DIRs 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.

    a.  <u>Service Record Book (SRB)/Officer Qualification Record (OQR) and Medical Screening</u>.  If the SRB/OQR and medical pre-screenings have not been completed, screen the potential HRT instructor.

    b.  <u>Commanding Officer's/Director's Interview</u>

        (1) Prior to this interview, the CO/OIC/DIR 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.

        (2) Based on screening results and this interview, the CO/OIC/DIR will determine if the candidate should be assigned to a HRT instructor billet.

        (3) In the event an individual does not meet the requirements and/or fails the screening process, the Formal School CO/OIC/DIR will contact the occupational field monitor for reassignment.

    c.  <u>Training</u>.  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 RM per their CO/OIC/DIR's requirements.  These evaluations shall be conducted by the course chief and reviewed by the CO/Director or his designated representative (assigned in writing).  The following signed entry will be made in the individual's SRB/OQR in addition to maintaining a copy of the individual's page 11 entry in the faculty record:

            "*(Date):  A review of <u>(subject's name)</u> 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 <u>(Course ID Number)</u> 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 receive Cardiopulmonary Resuscitation (CPR) and Automated External Defibrillator (AED) training and certification prior

to being certified as a HRT instructor.  A copy of the CPR and AED training shall be maintained in the individual's faculty record.

d.  <u>Proficiency Evaluations</u>.  Proficiency evaluations shall be conducted quarterly for all HRT instructors to ensure that all aspects of RM are being properly executed during training.  Evaluations will be in accordance with the forms contained in reference (x).

e.  <u>De-Certification</u>

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

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

f.  <u>Re-Certification</u>.  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 CO/OIC/DIR'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.

4.  <u>HRT Safety Officer (HRTSO) Selection</u>.  CO/OIC/DIRs will assign, as the sole collateral duty, an HRTSO.  Depending on the Formal School's size, more than one HRTSO may be required.  The HRTSO functions as the CO/OIC/DIRs resident expert for all aspects of HRT.  The minimum requirements to be a HRTSO are:  E-8 and above, 0-3 and above, graduate of the Ground Safety for Marines (MOS 8012) and Mishap Investigator courses, and completed or audited the HRT POI.  In addition, the following responsibilities are required for selection.

a.  The HRTSO is responsible for ensuring the RM process is fully implemented to minimize risk during all HRT.

b.  All prospective HRT instructors (military and civilian) shall be screened for suitability prior to assuming their duties.

c.  Formal School and Training Detachment CO/OIC/DIR are required to institute the policies contained in this Directive.

**HIGH RISK TRAINING INSTRUCTOR PRE-ASSIGNMENT CHECKLIST**

1.  Prerequisites.  To be considered for assignment to a HRT 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 and/or CFT.

    f.  Complete the service-level instructor course prior to executing orders (or during delay en route).  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 medical or psychological conditions determined by a military  health care provider as potentially disqualifying must be identified and referred for appropriate management if treatment is not ongoing. These include behavioral problems, difficulty in interpersonal relationships, an inability to cope with stressors, evidence of alcohol abuse or dependency, or current/chronic mental or physical health conditions or requirements (e.g. medication usage, continuity of care) that may interfere with the candidate's ability to perform duties.

3.  Findings.  A report summarizing the results of the prerequisites and Medical Screening findings will be forwarded to the Formal School or Detachment Commander.

            ENCLOSURE (1)

**HIGH RISK TRAINING INSTRUCTOR COMMAND SCREENING GUIDE**

1. <u>Objective</u>. Training activity CO/OIC/DIRs are ultimately responsible for ensuring high-risk instructor candidates are screened for professional, physical, and psychological suitability. This guide will assist CO/OIC/DIRs 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. <u>Screening and Interview Sequence</u>

   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 CO/OIC/DIRs may wish to repeat portions of the screening, but all training activities shall interview incoming instructor candidates. Subparagraphs 2.b.(3)(a) through 2.b.(3)(c) below provide some helpful guidelines in determining suitability.

   b. All high-risk instructor candidates shall have the following procedures completed:

      (1) <u>Service Record Screen</u>. Any adverse administrative entries, negative performance evaluations, non-judicial punishments, etc., shall be brought to the CO/OIC/DIR's attention prior to the interview. The training activity CO may delegate record screening authority to a subordinate within the command.

      (2) <u>Physical Requirements</u>. 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) <u>Medical Officer Interview, Record Review, and Questionnaire</u>

         (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 (e.g., 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. 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 in this MCO.

(4) <u>CO's Interview</u>.  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 training activity CO may delegate interviewing authority to a subordinate within the command.

3.  <u>Determination of Suitability</u>

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, suicide ideation or behavior, or suicide attempt.

(3) In-service diagnosis of personality or impulse control disorder.

(4) Any confirmed incident of child or spousal abuse (by member) or hazing.

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.

**HIGH RISK TRAINING RESIDUAL RAC 2 OR 3 SEVERITY I OR II**

1. <u>Risk Assessment Codes (RAC)</u>.  All elements of all courses shall be screened for HRT and assigned a code using the RM RAC.  HRT designation will be based on residual risk.  Per reference (aa), residual risk is that risk remaining after controls have been identified and selected.  Caution must be used so as not to focus on the residual risk vice the hazard.  Focus must remain on the hazard and controls selected in order to eliminate or reduce the threat.  CO/OIC/DIRs may not conduct or include in POI training events evaluated as residual RAC 1.  RAC 1 hazards have likely or probable risk of death, severe injury, loss of asset, or severe damage to assets.  A course will be designated as high risk if after application of controls to mitigate or reduce risk any element of the course meets any of the following conditions:

    a.  Residual RAC 2.

    b.  Residual RAC 3 where, regardless of probability of occurrence, the hazard severity is category I.  Category I hazards may cause death, loss of facility/asset, or result in grave damage to national interests.

    c.  Residual RAC 3 where, regardless of probability of occurrence, the hazard severity is category II.  Category II hazards may cause severe injury, illness, property damage, damage to national or service interests, or degradation to efficient use of assets.

2. <u>RAC 2 or 3 Severity I or II</u>.  Nothing replaces the need for CO/OIC/DIRs to be involved in all aspects of training.  The intent is to implement the rigors of a sound RM process in combination with the time-tested, common sense approach to leadership and adherence to the Marine Corps' training principles.

    a.  Include initial and residual RAC and safety controls in the note(s) section of the concept card.

    b.  Complete a RAW using the Risk Assessment Matrix for Marine Corps HRT Programs for each residual RAC 2 or 3 severity I or II course and maintain that checklist and RAW in the MLF.

    c.  Brief all students on cease training procedures.

    d.  Verify that all high-risk instructor candidates are screened.

    e.  Designate a HRT Safety Officer (HRTSO) for oversight of all HRT events.

    f.  Ensure the HRTSO meets the following minimum requirements:  E-8 and above, 0-3 and above, graduate of the Ground Safety for Marines (MOS 8012) and Mishap Investigator courses, and completed or audited the HRT POI.

    g.  Establish a schedule for the HRTSO to observe and evaluate all high-risk evolutions.  HRT checklists available on the Naval Safety Center web page: <u>http://www.safetycenter.navy.mil/</u>.

h.  Investigate and report all training related mishaps in accordance with reference (z).

i.  Ensure HRT course prerequisites include safety considerations.

j.  Verify that students meet all course prerequisites prior to commencing training.  If students do not meet the prerequisites, CO/OIC/DIRs may send students back to their respective commands.

k.  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.

l.  Design student critiques that address the following safety related areas:

(1) Cease Training procedures were explained.

(2) Lessons on safety were included as applicable.

(3) Lessons related safety to job performance.

(4) Emergency action procedures were explained.

(5) Safety precautions were in place for each event.

(6) Instructors followed all safety precautions.

m.  Conduct an annual safety review and verify the HRT Category of all courses.  In conjunction with this review, request mishap data and/or safety investigation reports associated with the HRT POI from CMC (SD) via HQMC_SAFETY_DIVISION@USMC.MIL or 703-604-4463/4462/4172 (DSN 664).

n.  Establish an instructor proficiency evaluation program that evaluates high-risk instructors in the appropriate instructional environment.

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

p.  Provide annual RM/HRT refresher training to faculty (e.g. mishap reporting, site-specific safety requirements/updates).

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

r.  Request a periodic safety evaluation from CMC (SD), via CG TECOM, at a frequency not to exceed 2 years.  CMC (SD) will provide a written evaluation report to the Formal School and to CG TECOM.

**HIGH-RISK TRAINING COURSES AT FORMAL SCHOOLS**

*East Coast*

<u>**Quantico, VA**</u>:
M02M729  METHODS OF ENTRY COURSE
M02KA3M  TANDEM OFFSET RESUPPLY DELIVERY SYSTEM-PERSONNEL PARACHUTIST
M02KAQM  MULTI-MISSION HIGH GLIDE PARACHUTIST
M02KAYM  TANDEM OFFSET RESUPPLY DELIVERY SYSTEM-EQUIPMENT PARACHUTIST (TORDS)
M02YF1M  MULTI-MISSION DOUBLE BAG STATIC LINE PARACHUTIST (MTT)

<u>**Camp Lejeune, NC**</u>:
M031302  BASIC COMBAT ENGINEER
M0381KB  COXSWAIN SKILLS (CRRC/RRC)
M03ACC2  COMBAT ENGINEER OFFICER
M03ACS2  COMBAT ENGINEER NCO
M03H4JB  SMALL BOAT COXSWAIN (RIVERINE) PHASE II

<u>**Dive School, Panama City, FL**</u>:
N20L6H1  MARINE CORPS COMBATANT DIVER COURSE
N20L6V1  MARINE CORPS COMBATANT DIVE SUPERVISOR COURSE
N20L6VM  MARINE CORPS COMBATANT DIVE SUPERVISOR COURSE (MTT)

<u>**SERE School, Brunswick, ME**</u>:
**N51M5Q1**  SURVIVAL, EVASION, RESISTANCE, AND ESCAPE **(SERE)**

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*West Coast*

<u>**Bridgeport, CA**</u>:
M24M7A1  SUMMER MOUNTAIN LEADERS
M24M7B1  WINTER MOUNTAIN LEADERS
M24MEA1  ASSAULT CLIMBERS COURSE
M24HB41  SCOUT SKIER COURSE
M24YA11  TACTICAL ROPE SUSPENSION TECHNICIAN COURSE

<u>**Coronado, CA**</u>:
N28M5Q1  SURVIVAL, EVASION, RESISTANCE, AND ESCAPE **(SERE)**

<u>**CAMP PENDLETON, CA:**</u>
M10AHK2  BASIC RECONNAISSANCE
M10NAM2  RECONNAISSANCE TEAM LEADER COURSE

<u>**EWTGPAC**</u>
N3013U1  FIRE SUPPORT MAN
N3081K1  COXSWAIN SKILLS
N30L8K1  SCOUT SWIMMER
N30INC1  INFANTRY COMPANY SMALL BOAT RAID COURSE
N30L9N1  MARINE CORPS INSTRUCTOR OF WATER SURVIVAL
N30H4A1  MARITIME NAVIGATION

APPENDIX E

ONLINE RESOURCES

| ONLINE RESOURCES | |
|---|---|
| **PURPOSE:** To provide online resources for Formal School academic faculty and support personnel and to allow rapid modification and access to these resources to receive the most up to date version. | |
| **Functional Area Checklist (FAC) 400** | |
| **DESCRIPTION:** Formal Schools will be inspected by the TECOM CGIP using the FAC 400 checklist.  Current FAC checklists are updated regularly and are available through the IGMC Marine Corps web site at: http://www.hqmc.marines.mil/igmc/Resources/FunctionalAreaChecklists.aspx. | |
| **Department of the Navy – Naval Forms Online** | |
| **DESCRIPTION:** Naval Forms Online (NFOL) has been established as an enterprise resource and central repository for all official forms generated and used by the Department of the Navy.  The below NAVMC Forms can be found at: https://navalforms.documentservices.dla.mil/web/public/forms.  They are also uploaded to the MTESD Sharepoint site below. | |
| **NUMBER** | **TITLE** |
| NAVMC 11755 | AFTER INSTRUCTION REPORT |
| NAVMC 11757 | LESSON ENVIRONMENT CHECKLIST |
| NAVMC 11758 | PROGRAM OF INSTRUCTION CHECKLIST |
| NAVMC 11759 | INSTRUCTIONAL RATING FORM |
| NAVMC 11760 | LESSON SAFETY REVIEW CHECKLIST |
| NAVMC 11761 | END OF COURSE CRITIQUE |
| NAVMC 11762 | INSTRUCTOR EVALUATION CHECKLIST |
| NAVMC 11763 | LESSON OBSERVATION CHECKLIST |
| NAVMC 11764 | POST GRADUATE SUPERVISOR SURVEY |
| NAVMC 11765 | SAFETY QUESTIONNAIRE |
| NAVMC 11766 | POST GRADUATE SURVEY |
| NAVMC 11768 | EXAMINATION RATING FORM |
| NAVMC 11769 | LEARNING ANALYSIS WORKSHEET |
| NAVMC 11770 | LEARNING OBJECTIVE WORKSHEET |
| NAVMC 11771 | CONCEPT CARD |
| NAVMC 11896 | OPERATIONAL RISK ASSESSMENT WORKSHEET |
| NAVMC 11899 | OPERATIONAL RISK ASSESSMENT MATRIX |
| **MTESD Sharepoint Site** | |
| **DESCRIPTION:** The below documents are additional resources that are avaialable on the MTESD Sharepoint site located at: https://vce.tecom.usmc.mil/sites/directorates/mtesd/SitePages/Home.aspx | |
| **NUMBER** | **TITLE** |
| | LEARNING ANALYSIS WORKSHEET CHECKLIST |
| | LEARNING OBJECTIVE WORKSHEET CHECKLIST |
| | MASTER LESSON FILE REQUIRED ITEMS CHECKLIST |
| | CONCEPT CARD CHECKLIST |
| | LESSON PLAN CHECKLIST |
| | EXAMPLE LESSON PLAN |
| | STUDENT OUTLINE CHECKLIST |
| | TEST CHECKLIST |
| | TEST ITEM CHECKLIST |
| | METHOD SELECTION GRID WORKSHEET |
| | MEDIA CHECKLIST |
| | INSTRUCTOR PREPARATION GUIDE CHECKLIST |
| | OPERATIONAL RISK ASSESSMENT WORKSHEET |
| | ACADEMIC SOP CHECKLIST |

APPENDIX F

<u>ACRONYMS</u>

AED        - Automated External Defibrillator

AIR        - After Instruction Report

ATRRS      - Army Training Requirements and Reserve System

CBT        - Computer Based Training

CCRB       - Course Content Review Board

CDD        - Course Descriptive Data

CeTARS     - Navy Corporate Enterprise Training and Activity Resource System

CG         - Commanding General

CID        - Course Identifier

CPR        - Cardiopulmonary Resuscitation

CT         - Cease Training

CTC        - Cease Training Criteria

DL         - Distance Learning

DOD        - Department of Defense

DODIC      - Department of Defense Identification Code

EDCOM      - Education Command

ECC        - End of Course Critique

ELO        - Enabling Learning Objective

ERF        - Examination Rating Form

FACAD      - Faculty Advisor

FLCER      - Formal Learning Center Evaluation Report

FEA        - Front-End Analysis

FMF        - Fleet Marine Force

FSQRMB     - Formal School Quota Requirements Management Branch

FSTS       - Formal Schools Training Support

HARP       - Holiday Accident Reduction Program

HRT        - High Risk Training

ICM        - Interactive Courseware Multimedia

IRF        - Instructional Rating Form

ISD        - Instructional Systems Design

ISC        - Information Systems Coordinator

ITE        - Individual Training Event

ITRO       - Interservice Training Review Organization

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

MCISD      - Marine Corps Instructional Systems Design

MCTFS      - Marine Corps Total Forces System

MLF        - Master Lesson File

MOS        - Military Occupation Specialty

MPP        - Manpower Plans and Policies

MSE        - Major Subordinate Element

MTESD      - MAGTF Training & Education Standards Division

MTT        - Mobile Training Team

RA         - Risk Assessment

RM         - Risk Management

RAW        - Risk Assessment Worksheet

OTA        - Air Force Oracle Training Application

PAJE       - Process for Accreditation of Joint Education

PME        - Professional Military Education

POI        - Program of Instruction

POM        - Program Objective Memorandum

PPBE          - Planning, Programming, Budget, and Execution

ROP           - Record of Proceedings

SACSCOC       - Southern Association of Colleges and Schools Commission on
                Colleges

SATE          - Systems Approach to Training and Education

SDD           - School Descriptive Data

SME           - Subject Matter Expert

SOP           - Standing Operating Procedures

SSC           - Service School Code

STU           - Subordinate Training Unit

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

VBL           - Values Based Leadership

VBT           - Values Based Training

VBT/L         - Values Based Training/Leadership

APPENDIX G

GLOSSARY


**Academic Faculty.**  Consists of military personnel and civilians who are directly involved in the design, development, instruction, assessment, revision, and adaptation of the POI or curricula to ensure its standards, quality, and relevance.  Additionally, faculty members should be engaged in the research, service, community of practice, and professional development in their areas of competency.

**Academic Time.**  Time required to transfer learning objective based instruction, outcome based instruction, evaluating performance, or conducting lesson purpose.  The minimum amount of daily academic time is 7 hours.

**Administrative Time.**  Time required in the POI to complete administrative tasks necessary for the smooth functioning of the course.

**Advocate**.  The Deputy Commandant or Counsel for the Commandant assigned to represent the Marine Corps as well as identify and prioritize capabilities required for specific organizational and functional areas.

**Attributes.**  The manifestation of competencies and traits required of all Marines to meet the challenges of the present and future operating environments.  Similar to how Mission Essential Tasks (MET) are the measurement associated to "collective" tasks, Marine attributes are the measurement associated to "individual" tasks.  The Marine Attributes are: Exemplary Character, Physically/Mentally Tough, Warfighter, Decide/Act/Communicate, and Leadership.

**Competencies.**  A specific range of knowledge, skills, attitudes (KSA) expected of an individual Marine and are acquired through the integration of training, education and experience.  Competencies are not associated with a specific course, but rather an individual's capacity to perform a job.

**Constructive (Training).**  Models and simulations that involve simulated people operating simulated systems (e.g., MAGTF Tactical Warfare Simulation). Real people make inputs to such simulations, but are not involved in determining the outcomes.

**Distance learning.**  Learning situation in which the instructor and/or students are separated by time, location, or both.  Education or training courses are delivered to remote locations via synchronous or asynchronous means of instruction (e.g. MarineNet, Blackboard).  DL does not preclude the use of the traditional classroom.  The definition of "distance education" is usually meant to describe something, which is broader than and entails the definition of e-learning.

**Education.**  Education, or more specifically, Professional Military Education (PME), is the process by which knowledge is attained in order to develop the analytical skills and critical thinking capability to enable Marines to adapt quickly in any environment.  PME conveys the broad body of knowledge and develops the habits of mind that are essential to the military professional's expertise in the art and science of war.  PME programs prepare leaders to think critically, apply military judgment, and make ethical decisions to solve complex problems in an environment of ambiguity and uncertainty.

**Educational Objective.**  A concise statement that describes what students are expected to learn as a result of an individual class or lesson within a program or course of instruction.  Educational objectives are the subordinate elements that must collectively be learned to accomplish the broader expectations of a Student Learning Outcome.  The statement begins with an action verb that indicates the desired level of learning (in accordance with accepted educational taxonomies) and corresponding type of assessment.  The action verb is followed by an explanation of the specific subject matter to be learned.  NOTE: Relative to an Enabling Learning Objective (ELO).

**Enabling Learning Objective.**  Describes the behavior for prerequisite knowledge and skills necessary for a student to perform the steps identified in the T&R event.  Subordinate to the TLO.

**Faculty Advisor**.  Similar to the roles and responsibilities of an instructor, FACAD is a term that is used most commonly to describe the role of an individual assigned to a teaching billet or faculty position that facilitates learning within the organization.  A FACAD can be a Marine, civil servant, or other service member who teaches a designated course approved by the appropriate general/flag officer in the chain of command.  This individual uses adult learning methodologies, typically in a small group setting, to advance student learning and to provide one-on-one interaction with students (e.g. mentoring, coaching, counseling).

**Formal Instruction.**  Training and education (consisting of formal courses of instruction) conducted by Marine Corps Formal Schools.  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).

**Formal School.**  An institution that develops and/or presents programs of instruction or curricula approved by the appropriate General/Flag officer to meet a specified training and education requirement.

**High Risk Training**.  Basic or advanced individual or collective training essential for preparing Marines and units for combat that, despite the presence of and adherence to proper safety controls, exposes students and instructors to the risk of injury, illness, death, or permanent disability; or property damage, damage to national or service interests, or degradation to efficient use of assets.

**Instructor.**  Categorized as individuals assigned to a teaching billet or faculty position that facilitate learning as their primary duty.  An instructor can be a Marine, civil servant, or other service member who teaches a designated course approved by the appropriate general/flag officer in the chain of command.  Augmented personnel support used as training aids (e.g. role players, demonstrator cadre) for instruction are not categorized to be an instructor.

**Learning Area.**  A logical classification of course content according to subject matter areas or overarching themes.

**Learning Environment.**  The physical conditions and surroundings in which a job is performed, or in which learning takes place, including tools, equipment, and job aids.

**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 Outcome.**  A concise statement that describes what students are expected to learn as a result of completing a program or course of instruction.  The statement begins with an action verb that indicates the desired level of learning (in accordance with accepted educational taxonomies) and corresponding type of assessment.  The action verb is followed by an explanation of the specific subject matter to be learned.  The assessment measure(s) associated with each Learning Outcome form the basis for student feedback and grading.

**Learning Setting.**  All official learning occurs inside the Training and Education continuum either at a Formal School, in the Operating Forces, or via a Distance Learning (DL) product.

**Lesson Purpose.**  Presents material that, while important, is not associated with learning objectives of a specific individual or collective training event and is not testable.

**Live (Training).**  Real people operates real systems to include both live people operating real platforms or systems on a training range and battle staffs from joint, component or service tactical headquarters using real world C2 systems.

**Master Lesson File.**  A compilation of living documents that are kept in the school to provide everything needed to conduct a lesson.

**Non-academic Time.**  Time instructors are in contact with students as required by the CG TECOM directives, various Marine Corps Orders, and the POI.

**Non-Standard Training Devices.**  Devices developed, funded and/or acquired independently of specific acquisition programs for major systems, end items, or weapons.  This includes generic devices which do not support a specific system.

**Process for Accreditation of Joint Education**.  A CJCS approved process for oversight, assessment, and improvement of the Joint PME programs at intermediate and senior colleges.

**Program of Instruction.**  A POI is a service-level training and education management document that describes a formal course in terms of structure, delivery systems, length, intended learning outcomes, and evaluation procedures.

**Program Outcome.**  A broad statement of a complex and multifaceted outcome intended for graduates to learn as a result of completing an educational program.

**Proponent**.  A Marine Corps official that assists advocates in representing the Marine Corps and identifying capabilities required for a specific functional area.

**Residual Risk**.  Risk remaining after controls have been identified and selected.

**Risk Assessment**. A structured process to identify and assess hazards.  Risk Assessment results in an expression of potential harm, described in terms of severity, probability, and exposure to hazards known. It is accomplished in the first two steps of the RM process.

**Risk Assessment Code (RAC)**. An expression of the risk associated with a hazard that combines its severity and probability into a single Arabic numeral which can be used to help determine hazard abatement priorities. This is typically accomplished through risk assessment using a risk assessment matrix. The basic RACs are 1-Critical, 2-Serious, 3-Moderate, 4-Minor, and 5-Negligible.

**Risk Management**.  A process that assists organizations and individuals in making informed risk decisions in order to reduce or offset risk, thereby increasing operational effectiveness and the probability of mission success. It is a systematic, cyclical process of identifying hazards and assessing and controlling the associated risks. The process is applicable across the spectrum of tasks and missions, both on and off duty.

**School Descriptive Data**.  A significant upgrade to the Curriculum Management Development Module (CMD) has been conducted in MCTIMS to better support the PPBE process.  This upgrade will give the Formal School staff and the higher headquarters staff, better visibility and thus better management of overall resource requirements for specific POIs and Formal School overhead.  The SDD will capture a roll up of POI resource requirements and Non-POI resource requirements for the Formal School.

**Southern Association of Colleges and Schools Commission on Colleges**.  The regional body for the accreditation of degree-granting higher education institutions in the Southern states

**Support Personnel.**  Support Personnel are primarily responsible for the general support of the Formal School (e.g. administration, supply, logistics, operations).  Although support personnel focus on the day-to-day operations of the Formal School, they can also be requested to assist faculty members as an adjunct member.

**Terminal Learning Objective.**  Describes the behavior a student is expected to perform upon completion of a lesson, topic, major portion of a course, or course completion.

**Training.**  The process by which skills are developed through progressive repetition of tasks commensurate with required capabilities (MCDP 1). Training can be executed across three domains: Live, Virtual, and Constructive (LVC).  Training can be executed across three domains: Live, Virtual, and Constructive (LVC) or a combination thereof.

**Training Device.**  An item designed or modified for training purposes. The device will normally involve simulation, stimulation, substitution, or miniaturization.  Training devices, particularly for weapon systems, are intended to complement (not replace) live fire training.

**Values Based Leadership**.  VBL is recognizing the inherent responsibility of leaders at all levels in reinforcing VBT.

**Values Based Training.**  VBT is the reinforcement and sustainment of the values subjects introduced in recruit training.  Those values subjects also

have a corresponding annual training requirement for all Marines as identified in MCBUL 1500.

**Virtual (Training).**  Real people operating simulated systems.  Virtual simulations inject humans-in-the-loop in a central role by exercising motor control skills (e.g., flying an air platform simulator, engaging targets in indoor simulated marksmanship trainer), decision skills, and/or communication skills.