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From: Commandant of the Marine Corps
To: Distribution List

Subj: MARINE CORPS FORMAL SCHOOL MANAGEMENT POLICY GUIDANCE

Ref: See enclosure (1)

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

1. Purpose. To promulgate the requirements and establish procedures to implement reference (a) and to support references (b) through (gg). Reference (a) is the authoritative policy that sanctions the procedures herein.

2. Cancellation. NAVMC 1553.2, CG TECOM ltr 1500 dtd 190805, and CG TECOM ltr 1500 dtd 190826.

3. Background. Commanding General (CG) Training and Education Command (TECOM), TECOM major subordinate commands (MSC), and cognizant Fleet Marine Force (FMF) commanders establish and sustain formal schools that prepare Marines and Sailors to perform capably in their FMF and supporting establishment (SE) billets. Marine Corps formal schools contribute to the readiness and lethality of the FMF by developing individuals with the knowledge, skills, and dispositions required of maneuver warfare. For this reason, reference (a) requires formal school management that ensures the continuity of service-level outcomes and the achievement of service-identified learning requirements.

4. Scope. A formal school is an institute that analyzes, designs, develops, implements, and evaluates a program of instruction (POI) or curricula approved by the appropriate general / flag officer to meet specified training and education requirements. A formal school operates one or more formal courses. A formal course is assigned and maintains a course identifier (CID) based on the guidelines in reference (r) and in compliance with enclosure (2). This publication guides all Marine Corps formal schools operating a formal course with an assigned CID. Highlights of the formal school management guidance are as follows:

    a. Chapter 1, *Learning in Marine Corps Formal Schools,* includes the requirement to employ outcomes-based learning, characterized by active, learner-centered instruction, to meet the skill and disposition requirements of the FMF / SE as identified by the military occupational specialty program, training and readiness program, professional military education program, and applicable orders and directives.

    b. Chapter 2, *Program of Instruction Development and Approval*, clarifies formal school and POI approval authority responsibilities in the process of

developing, modifying, submitting, and approving POIs. It also outlines unique mirror-image POI considerations.

    c. Chapter 3, *Developing and Maintaining Course and Lesson Files*, details the requirements for developing and maintaining POIs, master course files, and master lesson files.

    d. Chapter 4, *Evaluation in Formal Schools*, provides an overview of the requirements for evaluation programs. It also provides an overview of methods for course innovation.

    e. Chapter 5, *Instructor and Academic Faculty Development*, includes the requirements for professional development programs and new instructor certification; it provides an overview of service-level changes to the Marine Corps Center for Learning and Faculty Development, establishes novice-level course completion requirements, and outlines procedures for establishing service-level equivalency instructor courses.

5. <u>Changes</u>. Policy updates broadly focus on modernizing training and education through active, learner-centered learning experiences. Changes include but are not limited to the formal adoption of outcomes-based learning; change to POI staffing and approval processes resulting from CG TECOM delegation of POI approval authorities; and a shift in designing, developing, and facilitating learning experiences with feedback resulting in new course design and instructor development considerations. Recommendations for further improvement are encouraged.

6. <u>Information</u>. CG TECOM will review biennially and, as necessary, update this directive to provide current and relevant procedures to Marine Corps formal schools. Direct all questions or recommendations about this directive to: CG TECOM, Policy and Standards Division, 2007 Elliot Road, Quantico, Virginia, 22134.

7. <u>Command</u>. This guidance is applicable to the Marine Corps Total Force.

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

K. M. IIAMS
By direction

PCN: 10001918600

REFERENCES

(a) MCO 1553.2_ Marine Corps Formal School Management Policy
(b) MCO 1200.18 Military Occupational Specialty Program
(c) NAVMC 1200.1_ Military Occupational Specialties Manual
(d) MCO 1580.7_ Inter-Service Training
(e) MCO 3500.14 Aviation Training and Readiness Program
(f) NAVMC 3500.14_ Aviation Training and Readiness Program
(g) NAVMC 4790.1_ Aviation Maintenance and Supply Program
(h) MCO P3500.72_ Ground Training and Readiness Program
(i) NAVMC 3500.106_ Ground Training and Readiness Program Manual
(j) DODI 1322.35 Military Education
(k) MCO 1553.4_ Professional Military Education Program
(l) CJCSI 1800.01_ Officer Professional Military Education Policy
(m) CJCSI 1805.01_ Enlisted Professional Military Education Policy
(n) MCDP 7 Learning
(o) NAVMC 3500.18_ Marine Corps Skills T&R Manual
(p) MCDP 1-3 Tactics
(q) MCDP 1 Warfighting
(r) NAVMC 1553.3 Training Input Plan Program Guidance
(s) MCO 5100.29_ Marine Corps Safety Management System
(t) TECOMO 5100.1 TECOM Safety Management System
(u) TECOMO 3502 Training and Education Resource Management System
(v) MCO 1500.56 Marine Corps Values Program
(w) MCO 5300.18 Marine Corps Surveys Program
(x) TECOMO 5041.1 Commanding General's Inspection Program
(y) MCO 5040.6_ Inspector General of the Marine Corps Inspections Program
(z) CG TECOM Authority to Experiment Policy ltr dtd 05 Aug 19
(aa) CG TECOM Authority to Experiment Policy ltr dtd 26 Aug 19
(bb) NAVMC 3500.41_ Training and Education T&R Manual
(cc) DODI 1304.33 Protecting Against Inappropriate Relations During Recruiting and Entry Level Training
(dd) TECOMO 1609.1 Protecting Against Inappropriate Relations During Entry Level Training
(ee) SECNAVINST 5211.5_ Department of the Navy Privacy Program
(ff) DODI 1000.30 Reduction of SSN Use Within DoD
(gg) MCO 1553.10 Marine Corps Information Management System Standing Operating Procedures

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CHAPTER 1

LEARNING IN MARINE CORPS FORMAL SCHOOLS

1000. INTRODUCTION

1. The service requires adaptive leaders capable of successfully conducting maneuver warfare in complex, uncertain, and chaotic operating environments. Per reference (a), the desired end state of all training and education is the development of resilient Marines who possess a bias for ethical, intellectual action; are knowledgeable and decisive in applying their military occupational specialty (MOS) skills at the appropriate level; can readily adapt at the team or unit-level to rapidly changing circumstances within ambiguous naval environments; and are highly capable of enabling Marine Corps units and supported warfighting organizations to fight and win in evolving and novel threat contexts.

2. The Marine Corps employs a systems approach to training and education (SATE) to responsibly apply limited resources and develop Marines and Sailors with the highest possible readiness required in the Fleet Marine Force (FMF) and supporting establishment (SE). The system determines, defines, affects, and measures the learning necessary for individual or collective needs. As with any system, SATE includes phased inputs, internal processes, and outputs that often rely upon subsystems to accomplish overall goals. Within the system, units analyze, design, develop, implement, and evaluate training plans consisting of formal and managed on-the-job individual events and collective exercises. Similarly, formal schools analyze, design, develop, implement, and evaluate programs of instruction (POI) designed to meet individual service-level learning requirements. Formal schools develop individuals with the knowledge, skills, and dispositions that enhance FMF/SE readiness and lethality by enacting the policy requirements of reference (a) and the associated guidelines herein. Figure 1-1 highlights the system of systems approach.
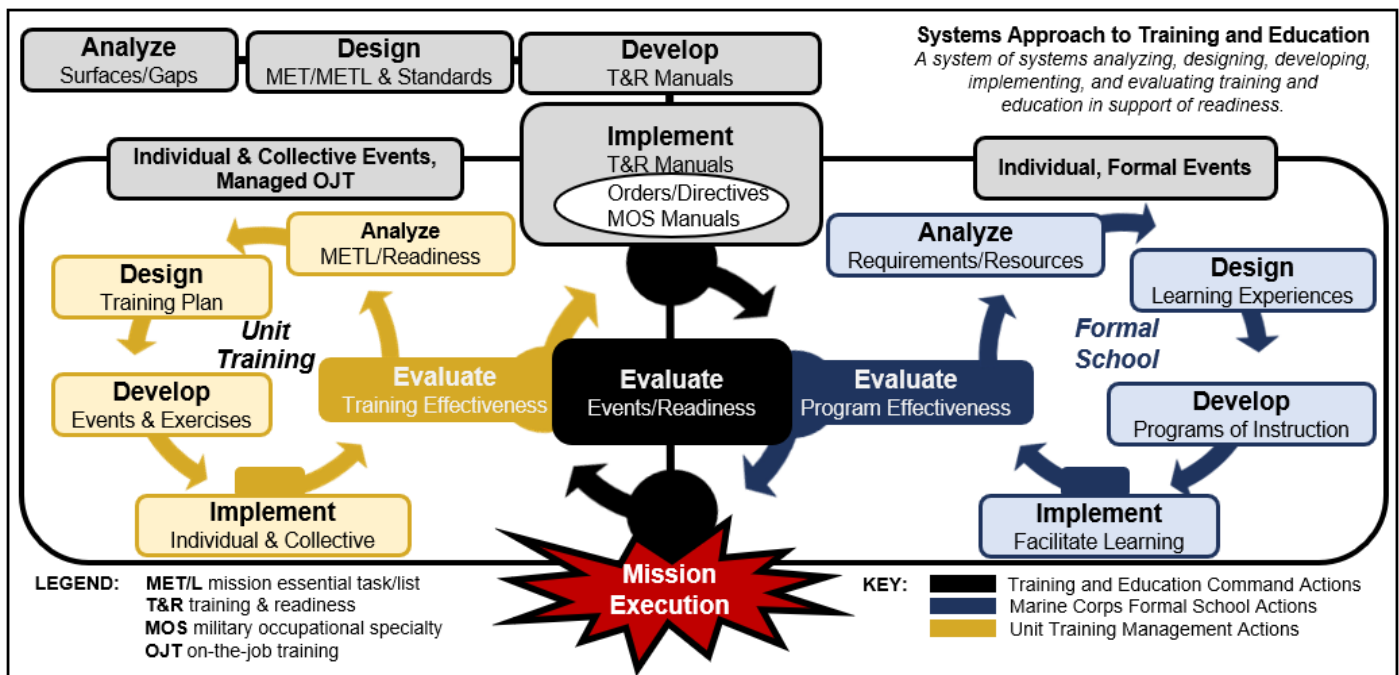

Figure 1-1. Systems Approach to Training and Education

1001. MARINE CORPS LEARNING REQUIREMENTS

1. Per reference (a), formal schools are administered to ensure continuity of service-level outcomes and satisfaction of identified learning requirements. Marine Corps learning requirements are established at the service and joint levels. Individual learning requirements applicable to formal schools are established and maintained by Commanding General (CG) Training and Education Command (TECOM) via the MOS program, training and readiness (T&R) programs, and professional military education (PME) program.

2. Military Occupational Specialty Program. Reference (b) is the policy to define billet requirements on the table of organization, skills qualifications of individual Marines, and learning required for MOS skills qualifications. CG TECOM approves MOS requirements for the Marine Corps. Based on approved requirements, formal schools either develop POIs or other service supplemental (OSS) course descriptive data (CDD) for other service courses designated to train Marines in accordance with DoD, DON, or limited Interservice Training Review Organization (ITRO) direction exceptions.

   a. Formal School. Commanding Officers (CO) of formal schools and all personnel involved in MOS production will familiarize themselves with reference (c) and ensure adherence to reference (b).

   b. Interservice Training Review Organization. In several occupations throughout the Marine Corps, the ITRO outlined in reference (d) provides the policies, responsibilities, and procedures to review, select, and align interservice formal schools to meet Marine Corps occupational readiness.

3. Training and Readiness Programs. As the standards bearer for the Marine Corps, CG TECOM approves and publishes standards in Marine Corps T&R manuals. References (e) and (f) are policy and guidance for the aviation T&R program. Reference (g) is the policy for the aviation maintenance and supply T&R program. References (h) and (i) are policy and guidance for the ground T&R program. The individual training events (ITE) and collective training events (CTE) in T&R manuals are based upon specific requirements and standards to ensure a common learning base and depth of combat capabilities. CG TECOM assigns a task analyst (TA) to a specific occupational field (OccFld) to manage the T&R process, analyze the community's T&R manual, and initiate T&R reviews incorporating service-prioritized inputs.

   a. T&R Manual Development. TAs host T&R manual working groups (TRMWG) to develop, review, revise, and validate ITEs and CTEs. Formal schools provide support to T&R programs per aviation-specific and ground-specific criteria outlined in references (e) through (i), including providing POI evaluation data and subject matter experts (SME) to associated TRMWGs in support of ITE development and modification.

   b. T&R Staffing and Approval. After TRMWGs, draft T&R manuals and a summary of changes (inclusive of all new or modified events) are staffed to various stakeholders across the enterprise, including but not limited to TECOM major subordinate commands (MSC). Once staffed, CG TECOM approves the T&R standards.

   c. T&R Manual Implementation. Individual training focuses on training skills to standards that support a unit's collective events. All T&R manual ITEs designate the setting at which the skill is first taught, either through formal schools (formal), managed on-the-job training (MOJT), or distance

learning (DL). Formal schools develop POIs on all approved, formal-coded ITEs ensuring performance to standard.

4. <u>Professional Military Education Program</u>. The Marine Corps PME program is a progressive learning system designed to educate Marines by grade throughout their careers. The program consists of resident and nonresident PME, continuing education, professional self-study, and the Marine Corps Professional Reading Program. Formal schools responsible for PME develop curricula following references (j) and (k). In accordance with reference (a), CG Education Command (EDCOM) details PME management policies and procedures for all subordinate formal schools. CG EDCOM ensures PME management policies and procedures establish equivalencies to those detailed herein (e.g., review boards, professional development, formal school evaluation, triennial submission of CDD, etc.). CG EDCOM publishes and maintains the *Marine Corps University (MCU) Academic Regulations* as the authoritative source for PME management, accessible via the links in Appendix A, *Online Resources*.

   a. <u>Marine Corps University</u>. To expand joint capabilities at appropriate levels, Marine Corps PME schools involved in joint professional military education (JPME) fulfill the joint learning areas (JLA) and joint learning outcomes (JLO) identified in references (l) and (m). MCU SMEs represent Marine Corps interests at joint formal schools to ensure JLAs and JLOs are met. The SMEs also represent Marine Corps interests in the officer and enlisted JPME update cycle per reference (k). At the direction of CG EDCOM, the MCU provost maintains officer and enlisted continuums, and applicable formal schools participate in refining the officer and enlisted PME learning outcomes. PME continuums are accessible using the links in Appendix A, *Online Resources*.

   b. <u>Officer Professional Military Education</u>. The review and maintenance of the officer PME continuum are overseen by MCU's Provost at the direction of CG EDCOM, in conjunction with the academic deans/chief academic officers of Expeditionary Warfare School, Command and Staff College, School of Advanced Warfighting, Marine Corps War College, Lejeune Leadership Institute (LLI) and the College of Distance Education and Training (CDET) to ensure compatibility across the resident and distance officer PME continuum. This group reviews and recommends refinements to the defined learning areas and validates the continuity of learning outcomes and requirements across officer PME programs.

   c. <u>Enlisted Professional Military Education</u>. The review and maintenance of the enlisted PME continuum are overseen by MCU's Provost at the direction of CG EDCOM, in conjunction with the academic deans/chief academic officers of the College of Enlisted Military Education, Marine Corps Senior Enlisted Academy, LLI, and CDET to ensure compatibility across the resident and distance enlisted PME continuum. This group reviews and recommends refinements to the defined learning areas and validates the continuity of learning outcomes and requirements across enlisted PME programs.

1002. MARINE CORPS APPROACH TO LEARNING

1. The Marine Corps is transforming its individual training and education continuum to an outcomes-based learning (OBL) model to generate cognitively agile Marines who can make bold and consequential decisions in challenging environments. At its most basic level, OBL focuses on achieving the desired outcome of a specific learning experience. The desired outcome is to enhance

and sustain the readiness and lethality of the FMF/SE by providing a more capable Marine. OBL has three lines of effort: a professional instructor cadre able to facilitate learning across cycles of action and reflection to achieve the desired results; the development of tangible knowledge and skills, grounded in rigorous and repeatable standards, resulting in technical and tactical proficiency; and the development of dispositions, grounded in desired attributes that enable capable performance across complex environments.

2. Professional Instructors. From an OBL context, instructors are the center of gravity. According to reference (n), "attracting, rewarding, and retaining a highly qualified cadre of effective instructors is a crucial factor in facilitating Marines' learning." Covered in greater detail in *Chapter 5*, OBL requires the professional development of world-class instructors, supported by academic faculty, who effectively facilitate active learning experiences across cycles of action and reflection to achieve the desired result, a more capable Marine.

    a. Results-Driven. OBL is about results. It places greater demand on instructors to meet individual learning needs and to cultivate the curiosity and initiative required for successful learning. Within OBL's learner-centered approach, instructors are provided reasonable autonomy to adapt methodologies and approaches to the needs of learners to ensure maximum comprehension and retention. Like mission orders and mission tactics, instructors are responsible to achieve the learning task(s) and purpose(s) but the where and how is left to those executing the mission.

    b. Learning Experiences. Instructors cultivate and sustain a challenging learning environment that prompts learners to actively engage in the process of learning. They facilitate rigorous learning experiences that replicate the conditions under which skills are performed and employ a range of learning methods to best develop desired attributes. Instructors blend knowledge, skill, and disposition development and prioritize learner-centered methodologies with feedback to support repetitions and sets that build automatic, muscle memory with knowledge and skills by embedding them within complex and uncertain contexts.

    c. Action and Reflection. Instructors facilitate learning across intentional and incidental cycles of action and reflection. Learning occurs through cycles of action and reflection along a continuity (i.e., from entry-level through career) characterized by extensive interaction and experience. Phrased differently, past experience makes possible current experience, which sets up future experience. Along this continuum, learning may be intentional (e.g., designed aspects of professional growth) and incidental (e.g., experience that was not planned or expected inside a course).

3. Knowledge and Skills. OBL emphasizes the mastery of core skills to enhance the task readiness of individual Marines. Marines are trained and educated in essential and advanced knowledge and skills that enable technical and tactical proficiency.

    a. Learning Tasks. Individual tasks in T&R manuals (and, as applicable, JLOs) specify the knowledge, skills, and performance standards required for individual readiness. The requirement to facilitate standards-based learning consistent with Marine Corps T&R tasks cannot be overstated. Tasks are foundational to what individuals *learn to do as the means of development.*

b. <u>Proficiency</u>. According to reference (n), Marines "ensure they are technically and tactically proficient as individuals, teams, units, and MAGTFs." Proficiency is achieved by focusing first on core skills—those essential basic skills that "make" a Marine and qualify that Marine for an MOS—and subsequently focusing on core plus skills—those advanced skills that are mission, rank, or billet specific. The pursuit of mastery begins with 'brilliance in the basics' and grows more complex as Marines advance in rank and experience. Technical and tactical proficiency is accomplished through mastery of both Marine and occupational skills. Proficiency is not achieved in a single instance. Mastery learning supports development through levels of proficiency. Mastery learning is often confused with a singular compliance-based go/no-go evaluation. At the core, mastery learning is learner-centered as it emphasizes formative assessment and feedback in a building block manner rather than summative evaluation with a grade and no feedback.

(1) <u>Marine Skills</u>. Marine skill proficiency refers to the demonstrated mastery of the knowledge and skills required by grade regardless of MOS. Reference (o), the Marine Corps Skills T&R manual, establishes the knowledge, skills, and performance standards expected of all Marines.

(2) <u>Occupational Skills</u>. Occupational skill proficiency refers to the demonstrated mastery of the knowledge and skills required of individuals in a particular MOS, rank, or specialized billet. Community T&R manuals and the MOS manual establish the knowledge, skills, performance standards, and other requirements for individuals by MOS, rank, or specialized billet.

c. <u>Training and Education</u>. Per reference (n), all warfighting skills, from basic to advanced, require dedication to continuous learning. Greater than the sum of its parts, learning encompasses cognitive, psychomotor, and attitudinal domains and addresses both the training and education required in the profession of arms.

(1) <u>Training</u>. Training encompasses events designed to develop, maintain, or improve the proficiency of individuals to perform specified skills. Adhering to such, reference (p) describes training in terms of its results: learning in the science of the profession focused on speed and accuracy, physical courage, and physical toughness. Getting to speed and accuracy takes repetitions and sets to rely on technical and tactical proficiency automatically, at need. As learning for the known, training lends itself to objective measures in the science of the profession.

(2) <u>Education</u>. Education encompasses events designed to develop, maintain, or improve the proficiency of cognitive skills. Education fosters breadth of view, diverse perspectives, critical and reflective analysis, abstract reasoning, comfort with uncertainty, and innovative thinking. Adhering to such, reference (p) advances education in terms of learning in the art of the profession focused on creativity and judgment, moral courage, and mental toughness. Education is essential to developing proficiency in the cognitive skills that enable adaptability, critical thinking, and the intellectual edge that transcends contexts. As learning for the unknown, education lends itself to subjective measure in the art of the profession.

4. <u>Dispositions</u>. OBL emphasizes the development of dispositions that enable individuals to perform capably across changing and complex situations. Dispositions are the qualities, traits, and characteristics that enable

performance in complex and changing conditions, as defined by the Marine Attributes and (as applicable) joint leader attributes.

a. <u>Learning Purpose</u>. Reference (o) states all individual training and education is intended to develop, foster, and sustain the Marine Attributes. Where mission essential task lists and Marine Corps tasks provide the purpose for collective tasks, the Marine Attributes provide the purpose for all individual tasks. Marine Attributes establish the framework of disposition development throughout the entire learning continuum. In short, attributes focus the *dispositions* expected of course graduates as *specific aims of development.*

b. <u>Marine Attributes</u>. Attributes include the qualities, traits, and characteristics an individual displays across situations and contexts. Desired attributes are codified at the joint and service-level. Reference (l) includes the joint officer leader attributes, reference (m) includes the joint enlisted leader attributes, and reference (o) includes the Marine Attributes. The Marine Attributes frame the characteristics expected of all Marines and are as follows.

(1) <u>Warfighter</u>. A Marine is proficient in their MOS and basic infantry skills, exercises sound and ethical judgment, possesses a bias for action, and maintains an offensive mindset. Marines are lethal, intellectually curious professionals, dedicated to a lifetime of study in the profession of arms and educated in the fundamentals of maneuver warfare, tactics, combined arms, and time-tested principles of battle.

(2) <u>Leader</u>. A Marine embraces their responsibility to one's fellow Marines, their families, and our shared legacy. A Marine has emotional intelligence to inspire and instill trust and confidence in other Marines. Sets the conditions for creative thought and execution, through personal example of selflessness, adherence to standards regardless of conditions and circumstances, and treats others with dignity and respect.

(3) <u>Physically/Mentally Tough</u>. A Marine fosters a warrior spirit, thrives in a complex and chaotic environment, is hardened against and resilient to adversity in order to persevere against seemingly impossible odds, and hones self-discipline to push past human factors and preconceived limits.

(4) <u>Critical Thinker/Decisive Actor/Effective Communicator</u>. A Marine thinks critically, makes the best possible decision, and acts on Commander's Intent. Seizes the initiative and acts with boldness and determination on available information in a chaotic environment. Communicates effectively and issues concise orders and guidance.

(5) <u>Exemplary Character</u>. A Marine has a clear understanding that they are entrusted with the special trust and confidence of their fellow Marines and that of the American people. Marines embody our core values of honor, courage, and commitment.

1003. FORMAL SCHOOL APPLICATION OF OUTCOMES-BASED LEARNING

1. OBL is an approach to planning, managing, and implementing learner-centered training and education that emphasizes the development of an individual based on the knowledge, skills and dispositions expected in the FMF/SE, resulting in cognitively agile Marines who can make bold and

consequential decisions in challenging environments. Formal schools will responsibly modernize POIs to ensure the application of OBL.

2. Transformation. Transforming the training and education continuum requires balancing change and stability. Too much change breaks each formal school's distinctive organizational competence by negating group implicit communication and team predictability. Too much stability makes the formal school irrelevant in a changing environment. A balance is needed; leaders at all levels shall seek balance consistent with this policy and guidance from the chain of command. Formal schools shall responsibly explore change and exploit stability while meeting production requirements and locally optimizing limited available resources.

3. Planning and Managing. Guided by efficiency, the Marine Corps has traditionally planned and managed instruction based on fixed inputs (e.g., time, content, instructors, etc.) and variable outputs (e.g., graduate knowledge and skill, characteristics, and ability to perform capably, etc.). Reference (n) identifies the need to produce more capable Marines by accounting for what a Marine already knows and tailoring learning to meet the needs of the learner, the desired outcome, and the subject matter. Focused on outcomes, OBL requires learning experiences that account for how and why individuals learn to promote learning 'what' knowledge and skills are important, 'why' they matter, and 'how' to think, decide, and act across changing situations.

    a. Input-Based Focus. An input-based approach to instruction involves the planning and management of learning experiences around inputs such as time, instructor expertise, and content. Akin to a mechanical assembly line, input-based approaches prioritize efficiency and production over effectiveness. In Marine Corps formal schools, the approach has resulted in passive learning experiences that do not resonate well beyond short-duration recall. The focus on inputs to learning, as the process of "telling" or "doing to," rather than on the outputs (or actual results), presents the Marine Corps with a problem of return on investment. While efficient, it assumes learning is a transfer process and accepts that individuals will retain only the bare minimum needed to pass a course while the FMF/SE will provide the experience for long-term retention.

    b. Output-Based Focus. An output-based approach to instruction involves planning and managing learning experiences around actual results. Prioritizing effectiveness, it requires planning and managing learning experiences around a clear set of learning objectives and learning outcomes to set the conditions for all learners to develop the knowledge, skills, and dispositions expected of the FMF/SE. OBL is purpose-driven to develop the knowledge and skills, defined in MOS and T&R manuals, and dispositions, defined by desired attributes in references (l), (m), and (o), required for capable performance across increasingly complex operating environments.

4. Implementing Learner-Centered Approaches. Per reference (a), formal schools will shift to active, learner-centered approaches supported by well-qualified academic faculty, support staff, and learning leaders. OBL represents a focus on learning-centered training and education. Learner-centered approaches requires a departure from the traditional roles of the instructor, learner, environment, and assessment and evaluation in individual training and education. Figure 1-2 highlights some of the key differences between instructor-centered and student-centered approaches.

Subject	Instructor-Centered	Learner-Centered
Roles	The instructor is the active agent in learning. Learning occurs because instructors deliver their expertise to the learner. The instructor, as the expert authority, is ultimately responsible for learning.	The instructor and learners are active agents in learning. Learning is constructed by individual learners, supported by the expertise of the instructor and engagement with peers. The learner is ultimately responsible for learning and the instructor facilitates the learning process.
Learning Environment	The learning environment is predominantly individualistic and competitive.	The learning environment is collaborative; individuals work together as members of a team to think and solve problems across contexts.
Content	Passive instructional methodologies focused on delivering content. Content is centrally controlled, and instructors are expected to deliver prescribed content, with little opportunity to tailor the content to learning objectives, learning outcomes, or learner. The focus is on content coverage and mastery of material as demonstrated evidence of "what" to think and do.	Active instructional methodologies focused on developing a deep understanding. Skilled instructors recognize individual learning needs and tailor the content to the learner. The focus is on application and performing assigned tasks to standard by applying knowledge and skills across contexts as demonstrated evidence of "how" to think.
Technologies	Limited use of technology to deliver static content.	Selection of specific technologies that augment the learning environment based upon the learning purpose, condition, and individual learner needs.
Assessments and Evaluations	Evaluation of qualification and standards requirements to determine graduation, with limited assessments. Evaluation administered by the instructor alone.	Evaluation of qualification and standards requirements to determine graduation, with many assessments in support of ongoing feedback. Assessments are administered by the learner, peers, and instructor.

Figure 1-2. Instructor-Centered versus Learner-Centered Approach

a. Roles. Historically, Marine Corps instructors were expected to 'deliver' information to many students, and students were expected to 'receive' learning. Reference (n) identifies learning as the professional responsibility of Marines at all levels. It is the individual Marine, not the instructor, who develops the knowledge, skills, and dispositions required in the profession of arms. Learner-centered approaches reflect a shift away from the "sage-on-the-stage" mentality, placing learning rather than instructor expertise at center stage. This shift elevates rather than diminishes the role of the instructor, requiring a professional instructor cadre characterized not only by subject matter expertise but also by expertise in facilitating learning.

b. Learning Environment and Content. An instructor-centered learning environment is characterized by passive, individualistic methodologies that do not replicate well the conditions under which tasks are performed. By contrast, a learner-centered environment is collaborative, enabling individuals to think and solve problems in context and as teams. According to reference (n), "Marines are challenged with problems they tackle as teams to learn by doing (i.e., experiential learning) as well as from each other."

The rigor applied to the learning experiences in Marine Corps formal schools must replicate, to the greatest extent possible, the actual requirements and standards of the job setting. Problem-based learning experiences with feedback support repetitions and sets in the known by embedding them within contexts. It also postures learners for the unknown through practice with problem-solving and decision making which inherently involves adapting existing knowledge and skills to novel and complex scenarios.

c. Leveraging Technology. Per reference (n), "Marines integrate supporting learning technologies seamlessly into the learning environment to educate themselves, learn vicariously, and realistically fight as they will train." Formal schools avoid the adoption of technologies that are present but not well suited to achieve learning requirements and needs, and instead "... continuously improve their knowledge and skills by leveraging technology — but never depending upon technology alone as a solution," per reference (n). Formal schools integrate learning technologies that enhance the learning experience and support desired outputs. In doing so, formal schools specifically consider the following:

(1) Simulations and Wargames. Per reference (a), all formal schools will assess the merits of simulations and wargames with respect to their unique learning requirements. Formal schools should solicit OccFld input on the use of specific simulations and wargames. Both learning technologies offer significant opportunities within formal instruction to integrate contextually rich, problem-based learning activities.

(2) MarineNet eLearning Ecosystem. The standard virtual learning platform for the Marine Corps is the MarineNet eLearning Ecosystem (eLE). The eLE provides capabilities that enhance the learning environment with a variety of tools. Formal schools are encouraged to review the current components and capabilities advertised on the eLE platform or to contact CDET for additional information or support. Where applicable and suited to the learning requirements and needs of a POI, formal schools will leverage eLE for asynchronous (learners access courseware on their own time without direct instructor engagement) learning. Asynchronous learning is generally used for blended learning or entire programs.

(a) Blended Learning. Blended learning requires learners to engage in learning both asynchronously and synchronously (with direct and real-time instructor engagement) at the formal school. Blended learning can vary from assigning asynchronous learning requirements with accountability before formal school residency (or after attendance is complete) to assigning asynchronous learning requirements with accountability outside of formal class time while resident at the formal school.

(b) Entire Programs. Asynchronous learning with accountability may be used for entire POIs. This use of technology offers the potential to enable those with the intellect, desire, and motivation to learn and proceed through courseware at accelerated paces and graduate at speed.

d. Assessment and Evaluation. Learner-centered approaches emphasize both assessment and evaluation of learners. In this context, evaluation refers to the procedures used to determine whether the individual meets preset criteria, such as MOS qualification and the mastery of rigorous standards, and assessment refers to the process of gathering information to monitor progress toward requirements with an emphasis on providing learners with the feedback required to successfully master requirements. Feedback

provides learners the opportunity to reflect on learning experiences. From an OBL perspective, the learner, the instructor, and peers engage deeply and meaningfully in assessments to provide learners feedback to support the achievement of qualification and evaluation criteria. Formal schools do not use assessment as a replacement for evaluating qualifications and standards achievement but leverage assessment to enhance the learner's successful achievement of qualifications and standards through consistent and thorough feedback strategies.

CHAPTER 2

PROGRAM OF INSTRUCTION DEVELOPMENT AND APPROVAL

2000. INTRODUCTION

1. Reference (a) requires the submission of a POI every three (3) years, unless otherwise directed. POIs must satisfy service-level learning requirements. Formal schools accomplish this through the execution of curriculum review boards (CRB) and the appropriate submission guidance herein.

2. Per reference (a), CG TECOM acts as the approval authority for all Marine Corps training and education standards and POIs/curricula not formally assigned or delegated to TECOM MSC or Marine Corps Forces (MARFOR) CGs. TECOM MSC CGs are delegated POI/curricula approval authority for all assigned formal schools and/or training detachments, and MARFOR CGs and their MSC commanders act as POI approval authority for non-TECOM formal schools that fall directly under their cognizance. POIs are reviewed and approved based on the submission, staffing, and approval guidelines that follow.

2001. CURRICULUM REVIEW BOARD

1. A POI is a service-level learning management document that describes a formal course in terms of target population description (TPD), program learning outcomes (PLO), subordinate learning outcomes (SLO), learning objectives (LO), course structure (and length), facilitation methods, evaluation methods, capacity, and resourcing requirements. Formal schools create POIs through CRBs (*see 4003 and 4004 for exceptions*). The purpose of a CRB is to develop a POI that fully achieves service-level learning requirements. The following events should result in a CRB:

    a. Approval of an updated or revised T&R manual with new or modified ITEs.

    b. Approval of an updated or revised MOS manual with new or modified prerequisites or requirements.

    c. As directed in the Manpower, Personnel, and Training Plan based on new equipment.

    d. As directed by CG TECOM or the POI approval authority, or within three (3) years of the last CRB. *For example, a formal school may be directed to conduct a CRB following the identification of a significant course capacity shortfall during the annual Training Input Plan (TIP) development cycle.*

2. Timeline. Formal schools will submit a plan of action and milestones (POA&M) to the POI approval authority within 30 days of any event requiring a CRB. Formal schools will analyze the course(s) impacted by the service-level change and submit a POA&M to the POI approval authority, detailing the formal school's plan to execute CRB(s) and POI submission(s) for all affected courses. The POI approval authority will either approve the POA&M or provide detailed guidance for corrective action. In circumstances where the formal school cannot meet the 30-day requirement, the formal school will justify the delay and request an extension from the POI approval authority.

3. Board Membership. The CRB will consist of formal school and FMF/SE SMEs. Formal schools will also invite the OccFld manager and TECOM TA, as applicable. Although not required members of the board, formal schools will engage with the appropriate stakeholders as needed throughout the board. Such engagement could include but is not limited to the Marine Corps Student Registrar Branch (MCSRB) on TIP or MOS concerns or higher headquarters on policy, resourcing, or other issues.

4. Target Population Description. Formal schools shall analyze existing student populations and produce a TPD. A TPD provides the general description of an average student and establishes minimum administrative, physical, and academic prerequisites each student must possess prior to attending a course. For an MOS producing course, the target population and the prerequisites reflect the requirements contained in the MOS manual. At no time will school commanders edit the prerequisites or TPD for the course to make the entry requirements for the course more demanding or restrictive than is communicated in the MOS manual without CG TECOM review and authorization.

5. Learning Objectives and Learning Outcomes. According to reference (q), there are two parts to any mission: the task to be accomplished and the reason or intent behind it. The task describes the action to be taken while the intent describes the purpose of the action. Much like any mission, Marine Corps learning has two parts: the task(s), or learning objective(s), to be accomplished and the purpose(s), or learning outcome(s).

    a. Learning Objective. An LO is a statement of the behavior and level of performance expected of a learner as the result of a learning experience. LOs are expressed in terms of the behavior, the condition under which it is exhibited, and the standard to which it will be performed or demonstrated. LOs establish the *means of development* by communicating the tasks required during a learning experience, with a focus on building knowledge and skill proficiency and task readiness in the science and art of the profession. The formal school will include at least one learning objective for each approved, formally coded ITE in the T&R manual. For all new or modified T&R events, formal schools conduct a learning analysis on the ITEs in the course task list before or during the conduct of CRBs. For all existing events, formal schools leverage assessment and evaluation data to determine the need for LO modification.

        (1) Condition. The condition describes the learning environment in which the learner performs an LO. It is derived from the condition contained in the T&R manual, which reflects real-world or job-specific conditions. While formal schools replicate actual job performance to the greatest extent possible, they adapt the ITE condition to ensure the LO accurately states the conditions present in the learning environment. The following example illustrates how a formal school, limited by systems access, adapts an ITE condition to the learning environment. For clarity, *formal schools are expected to adapt the ITE condition to the realities of the learning environment; this does not constitute a downgrade unless adapting the condition results in an inability to achieve the associated standard*. In this illustration, the ITE condition requires access to systems not present in the formal school's virtual learning environment.

            (a) ITE Condition: Given **a report**, source documentation, access to SABRS or **other appropriate feeder system**, and the references.

(b) <u>LO Condition</u>: Given **necessary reports**, source documentation, access to SABRS, **screenshots of the feeder system**, and the references.

(2) <u>Behavior</u>. The behavior reflects what the learner will do within the confines of the learning environment and should as closely as possible replicate what the student will do on the job. At times, the learning environment will preclude the formal school from replicating the ITE behavior. In these instances, a formal school will adapt the behavior to the learning environment to ensure the LO reflects the actual expectations of the learner within the formal school. For clarity, *formal schools are expected to adapt the ITE behavior to the realities of the learning environment; this does not constitute a downgrade unless adapting the behavior results in an inability to achieve the associated standard*. Behavior statements must contain only one action verb and object, be free of ambiguity, be stated in learner terms, and express a realistic performance of the behavior in the learning environment.

(3) <u>Standard</u>. Standards state the quality or quantity of acceptable behavior. Standards are complete, accurate, realistic, and timely statements of how well the task must be performed. Formal schools will duplicate, verbatim, the standard from the ITE. While it is expected the condition and behavior are adapted to the learning environment, *any modification to the standard requires a downgrade and justification*. In the event adapting the condition and behavior of an ITE to the learning environment results in an inability to achieve the standard verbatim, the formal school will provide a downgrade justification inclusive of the rationale for the downgrade and the proposed modification. All standard downgrades will be addressed in the CO's cover letter.

b. <u>Learning Outcomes</u>. Learning outcomes establish the *aims of development* by communicating the knowledge, skills, and dispositions expected of a learning experience, with a focus on building the dispositions that enable effective performance in complex situations. Measuring progress and feedback towards the aims of development requires integration with a series of learning objectives that prompt learner behavior. Unlike a purely objectives-based approach, an outcomes-based approach requires the inclusion of dispositions. PLOs describe the knowledge, skills, and dispositions learners develop across lessons at the scale of an entire course, and SLOs describe the knowledge, skills, and dispositions that develop across a specific portion(s) of the course.

(1) <u>Knowledge and Skills</u>. Formal schools analyze T&R and MOS manuals to determine the knowledge and skills expected of course graduates. T&R manuals categorize events using recognizable codes (e.g., RFL for rifle, DEF for defense, C2 for command and control) to make the skill or functional area being referenced obvious. MOS manuals identify the knowledge and skills required by occupation. For example, a rifleman (0311) must be able to employ the M16M4/A4 Service Rifle, the M203 Grenade Launcher, the M27 Infantry Automatic Rifle, and, as a noncommissioned officer, lead teams. Formal schools may analyze the T&R and MOS manual to identify the knowledge and skills expected of a course graduate.

(2) <u>Dispositions</u>. The Marine Attributes reflect the qualities, traits, and characteristics expected of Marines. Marine Attributes reflect the service-level outcome expected of all Marine Corps training and education. Formal schools analyze the Marine Attributes (and, as applicable, joint desired leader attributes) and course mission to determine the

applicability of individual attributes and the appropriate level of attribute achievement for the specific course.

c. Integrating Learning Outcomes and Learning Objectives. Reference (a) requires formal schools to integrate learning outcomes and learning objectives in a complementary manner. Formal schools integrate PLOs, SLOs (as appropriate), and LOs in a supporting and complementary manner, as reflected in Figure 2-1. Proper integration is characterized by the following:
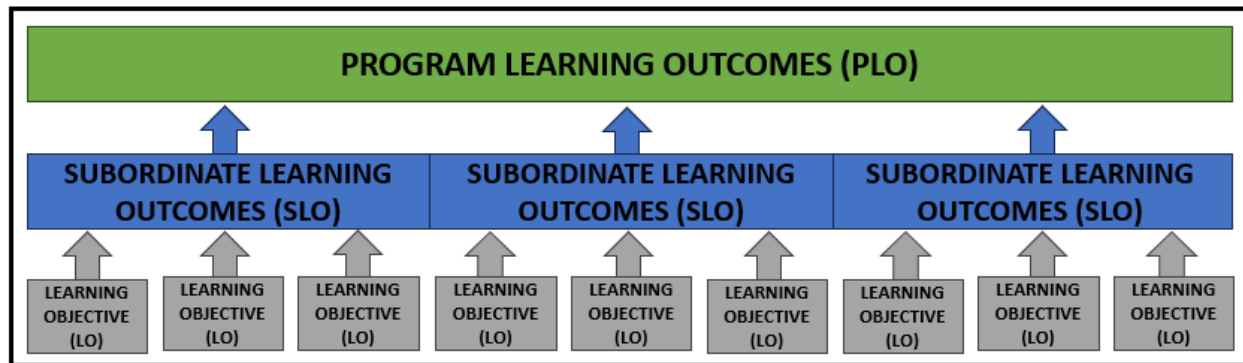

Figure 2-1. Integrating Learning Outcomes and Learning Objectives

(1) PLOs support the logical progression of the career continuum.

(2) PLOs build upon the SLOs (as applicable) and LOs (or educational objectives, where applicable) to specify what an individual can do and how an individual will be upon completion of a POI. Courses *should* have approximately three (3) to five (5) PLOs to define the aims of the course.

(3) SLOs build upon LOs to specify what an individual can do and how an individual will be upon completion of a learning experience or set of learning experiences within a POI (such as completion of a phase, annex, or course within a POI), as it applies to achieving the PLOs. Where used, more than one set of SLOs are necessary within a POI to support PLOs.

(4) PLOs and SLOs provide the aims to measure progress towards developing desired knowledge, skills, and dispositions via the means of associated LOs. Assessing PLOs and SLOs requires connection with associated LOs across lessons and differing contexts.

(5) PLOs and SLOs are clear, concise, and convey to the instructor and learner the knowledge, skills, and dispositions expected of the learner upon completion of a portion of the POI or the entire POI.

6. Naval Orientation or Integration. Per reference (a), formal schools are required to consider naval understanding or integration when designing POIs. The CRB will design naval integration options considering the PLOs, SLOs, LOs, TPD, and resourcing. Naval orientation and integration shall be resource-neutral or else deemed not practical. Local approaches will fall into one of three categories.

a. Existing Task. If existing T&R events or JLOs assigned to a course address naval orientation or naval integration (such as tasks dealing directly with amphibious operations), no additional integration is required. Formal schools will ensure concept cards associated with these naval-related

lessons and exams highlight the naval integration aspects in concept card notes. Formal schools will collect regular feedback from FMF/SE stakeholders regarding the naval orientation and integration to provide recommendations for T&R event refinement.

b. <u>Task Overlay</u>. If no existing T&R events or JLOs assigned to a course directly address naval orientation or integration, formal schools will seek any adjacent T&R events or JLOs in which naval scenarios could apply, stacking on top of the knowledge or performance. In other words, formal schools seek lessons and exercises in a course without a naval-related T&R event where a naval scenario could overlay. Formal schools will ensure concept cards associated with these stacked naval scenarios highlight the overlay integration aspects in concept card notes. Formal schools will also collect regular feedback from FMF/SE stakeholders regarding the naval orientation and integration to frame recommendations for the addition of naval aspects to existing T&R events or for the creation of a new tailored T&R event for later inclusion in the course.

c. <u>Not Practical or Lesson Purpose</u>. If the above scenarios do not apply, a formal school may opt to either determine naval integration is not practical or include a lesson purpose (i.e., no learning objective assigned) concept card. If determined not practical, a formal school will record and maintain a memorandum before POI submission. If determined practical, the lesson purpose concept card will highlight the non-tested naval orientation or integration covered. Naval integration lesson purpose time will not count towards the lesson purpose hour limitations.

7. <u>Course Structure</u>. The course structure is a detailed chronological document identifying the implementation plan for a course. The purpose of developing a course structure is to determine how much content is appropriate for a single lesson or a single exam and arrange the lessons and exams in a logical sequence. It provides an outline of how the lessons in the course will flow from start to finish. A course structure is not a course schedule; however, it does provide a guideline for developing the course schedule. It contains all academic and administrative events that take up the time allotted for the course. Course hours not supporting learning outcomes/learning objectives should be carefully considered. At a minimum, a course structure will contain lesson designators, titles, facilitation methods, evaluation methods, and academic hours—each from the pertinent concept card (*see Chapter 3 for more information on concept cards*).

8. <u>Learning Experience</u>. Figure 2-2 outlines the learning experience continuum, ranging from passive methods arranged around the inputs of learning (passive learning experiences) to active methods arranged around the outputs of learning (active learning experiences). Formal schools will select the methods most appropriate to their unique mission, with a bias towards active learning experiences. Where practical and supportive of PLOs, SLOs (as applicable), and LOs, formal schools should leverage problem-based learning supported by independent study.
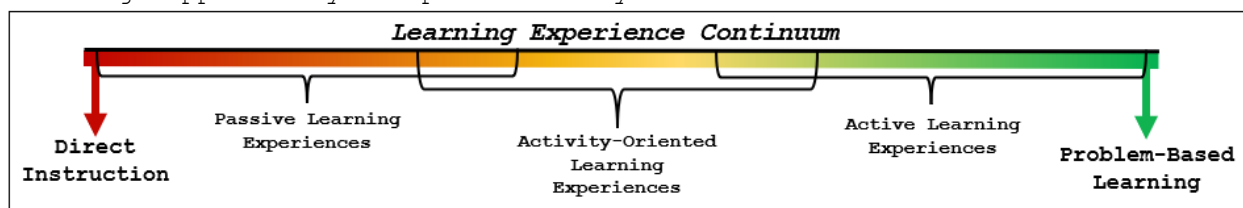

Figure 2-2. Learning Experience Continuum

ENCLOSURE (2)

a. Passive Learning Experiences. Passive learning experiences are the result of passive methods arranged around the inputs of learning. Passive learning experiences result from the use of *direct instruction* arranged around the instructor, content, or time. Direct instruction methods (such as lecture or demonstration) may be effective for providing information quickly or developing step-by-step skills; however, overreliance on the method can be passive and authoritarian. The methods are most effective at the beginning of a new unit of study, to introduce new concepts, or to provide guidance to more novice students but should be used sparingly as they do not result in long-term retention and performance, yielding little return on the resources invested.

b. Activity-Oriented Learning Experiences. Activity-oriented learning experiences are the result of active learning methods arranged around the inputs of learning. Activity-oriented learning experiences provide the benefits associated with active learning (such as higher order thinking skills and long-term retention) but the arrangement around instructor or content inadequately results in the learner's ability to apply knowledge and skills to solve real-world problems. Active learning methods may generally fall into the categories of *indirect facilitation* and *interactive learning*. *Note: the following methods are not unique to activity-oriented learning experiences and may support active learning experiences, when arranged around the outputs of learning rather than the inputs.*

(1) Indirect Facilitation. Indirect facilitation teaches students to observe, investigate, draw inferences, form hypotheses, make conclusions, identify generalizations, find patterns, and explain their thinking. It requires higher order thinking skills such as analysis, synthesis, and evaluation. Examples include but are not limited to guided discussions, indirect discourse, concept maps, case studies, and metacognitive prompts.

(2) Interactive Learning. Interactive learning involves learner and peer engagement to help learners integrate concepts; or to help them apply, think, and innovate in novel situations. These methods can be used to reinforce and extend understanding or in situations where some learners 'get it' and others do not. Examples include but are not limited to role playing, guided application, Socratic seminars, sand table exercises, simulations, and war games.

c. Active Learning Experiences. Active learning experiences are the result of active learning methods arranged around the outputs of learning. Active learning experiences provide the benefit of active methods (such as higher order thinking skills and long-term retention), and the benefits of an outputs focus (such as the learner's ability to think and solve problems in context). Active learning experiences may result from the arrangement of any active learning method (see above) around the outputs of learning; however, the ideal active learning experience is characterized by *problem-based learning* supported by *independent study*.

(1) Independent Study. Independent study refers to a range of tactics and methodologies requiring learners to complete activities independently or as part of a small group. Independent study involves individual, self-led learning, such as completing homework. It is very flexible and can be used as the primary approach for an entire lesson, in combination with other approaches, or assigned to some students while the rest of the class completes different activities. Examples include but are not limited to reading assignments, video assignments, planning products, map

work, learning logs, and research. *Note: independent study must include an accountability event, such as a quiz, test, discussion, or other tool.*

(2) Problem-Based Learning. Problem-based learning is an inquiry-based approach to learning that centers on applying knowledge and/or skills amidst uncertainty, with feedback as the key. Rather than receiving instruction on content, learners are presented with a real-world problem and work in teams to discover solution(s). The instructor facilitates the learning process by guiding and coaching individuals and teams as they define their own learning issues—through identification of individual and group surfaces and gaps—and generate solutions to real-world problems. Problem-based learning is a process supported by an instructor and curriculum. The process is facilitated by skilled instructors and replicates common problems the learners will experience on-the-job, and the curriculum consists of carefully designed problems that guide the learner toward requisite knowledge and skills, problem-solving proficiency, independent-study strategies, and intangible attributes.

9. Evaluation and Assessment. The CRB will determine assessment and evaluation methods, considering the following.

a. Evaluation Methods. Learner evaluation refers to the procedures used to determine whether the individual meets preset criteria, such as MOS qualification and the mastery of rigorous standards. In short, *evaluation based on ITEs and MOS requirements (as applicable) is the basis for determining course completion.* The CRB will determine evaluation criteria and methods to ensure each approved and formally coded ITE is evaluated to standard and (where appropriate) course prerequisite and MOS requirements duplicate those in the MOS manual. For MOS-producing courses, school commanders will not include evaluations unrelated to the ITEs.

b. Assessment Methods. Learner assessment refers to the process of gathering information to monitor progress toward requirements with an emphasis on providing learners with the feedback required to successfully master requirements. Formal schools will minimally assess each PLO (and as applicable SLO) for program effectiveness and learner feedback purposes. The CRB may consider assessment methods, or the formal school may develop methods upon CRB completion.

10. Capacity. The TIP contains quota requirements captured by course identifier (CID), sponsor, MOS (if appropriate), and student type. The TIP is a rolling forecast of the school seats required to prepare Marines who will populate billets in the FMF/SE, and it is a living plan maintained within the Marine Corps Training Information Management System (MCTIMS) student registrar module. Formal schools are responsible for providing necessary course capacity (i.e., the maximum seats a formal school can provide annually in a particular course, dependent upon resourcing) to support current and future TIP requirements or identifying shortfalls that constrain a course's ability to support in projected out-year TIP requirements and for complying with the procedures and guidelines outlined in reference (r). Formal schools must analyze their ability to support the TIP each fiscal year given available or anticipated annual course capacity while considering learning requirements and resourcing.

11. Resource Requirements. Developed POIs must reflect the actual quantity (i.e., TIP), quality (i.e., standard), and resources (e.g., time, manpower,

facilities, ammo, ranges, supply/equipment, etc.) required to satisfy learning requirements.

    a. Learning Requirements. Formal schools will develop POIs that satisfy all quantity and quality requirements. Formal schools will consider the following questions and are encouraged to consider other relevant factors:

        (1) Can the school fully support the TIP, given established learning requirements, standards, and resources?

        (2) Can the school achieve the PLOs, given standards, TIP requirements, and current resourcing?

        (3) Are current TIP requirements and resourcing levels likely to result in a significant downgrade to standard(s) or PLOs?

        (4) Are new requirements (e.g., new order or equipment) achievable given current resource levels, or is there a significant resource shortfall not captured by any of the above questions?

    b. Technical Requirements. Formal schools will avoid the adoption of technologies that are available but not well suited to achieve learning requirements and needs based on their current CDD/POI. In doing so, formal schools will specifically utilize TECOM's formal schools technical refresh (FSTR) program to equip their student populations with End User Devices. Formal schools will identify information technology (IT) shortfalls using the referenced formal curriculum review process, in coordination with their MSC's G-4 and G-6, who will then coordinate with TECOM G-4 and G-6. CDD/POI data is the basis for requesting IT assets funded by FSTR. Concurrently, formal schools will submit a table of organization and equipment change request (TOECR) and as needed an information technology procurement request (ITPR) via their respective G-4 and G-6 to reflect new requirements with proper justification.

12. Record of Proceedings. The record of proceedings (ROP) is the only document that validates a CRB took place. ROPs are inspectable items and will be maintained as supporting documentation for all currently executed POIs. POI approval authorities will review the ROP to verify recommendations certified by CRB members in conjunction with the cover letter and POI submission. The ROP minimally includes:

    a. Membership. A by-name roster of all voting and non-voting members.

    b. Agenda Items. A summary of all discussion items and recommendations made during a CRB. The following are required agenda items.

        (1) Standards. Summary and justification of downgrades and any relevant member concurrence/nonconcurrence related to downgrades with particular emphasis on whether recommended changes still accomplish the PLOs and, as applicable, SLOs. Ensure each LO is evaluated and that an LO is present for each ITE in the T&R manual.

        (2) MOS Requirements. For MOS-producing courses, validate the course is aligned with MOS manual changes and summarize member concurrence or nonconcurrence. Address any alteration to the TPD or prerequisite requirements listed in the MOS manual or provide negative response.

c. Course Revision. Provide a summary of all recommendations for course revisions. The ROP will highlight course structure changes and lesson changes by lesson designator, lesson title, and lesson time expressed in hours.

d. Resources. Identify any required resource revisions resulting from recommended changes.

e. Certification. At a minimum, all voting members and the CRB chair will sign the ROP, certifying the accuracy of the content. Signature does not represent concurrence and all attendees should ensure dissenting opinions are captured within the ROP before signature.

2002. PROGRAM OF INSTRUCTION SUBMISSION AND APPROVAL

1. All formal schools will have POIs approved by the general/flag officer with cognizant authority before implementation. Formal schools are not authorized to execute POIs—or individual PLOs, SLOs, and LOs—not approved via the following guidelines.

2. Formal School Action. The formal school commander shall ensure completion of the following actions before POI submission.

a. Resource Validation. The formal school shall review and validate POI resource information, and commanders shall verify the POI resource information accurately represents resource usage before POI submission.

b. Risk Validation. Commanders will ensure the POI meets risk management (RM) and high-risk training (HRT) requirements per references (s) and (t). HRT instructors must be certified per the references. At first POI submission, commanding officers will ensure the POI includes *tentative* risk assessment levels (RAL) for all lessons and exams. Accepting tentative RALs at first submission reduces delays in POI submission while the work to analyze new or updated concept cards proceeds to enable decisions on the assignment of final initial and residual RALs. POI approval authorities will receive by exception changes to all initial and residual RALs reported from the formal school after first submission and before POI approval as needed. After POI submission and before course implementation, commanders will also ensure each concept card has an associated risk assessment worksheet (RAW), using the joint risk assessment tool (JRAT) or DD Form 2977. *Note: MCTIMS does not yet support RALS in concept cards. Formal schools will record JRAT levels in concept card notes prior to POI submission.*

c. Commanding Officer's (CO) Cover Letter. Formal school commanders shall certify the validity and accuracy of the POI and accompanying ROP by signing and routing a cover letter to the POI approval authority. In standard naval format on required letterhead, the cover letter shall address the following items, as applicable.

(1) Identify any intended downgrades, the factors driving downgrades, and any mitigation strategies.

(2) Identify any resource shortfalls, highlighting those most critical to the execution of the POI.

(3) Identify any factors driving capacity shortfalls and any mitigation strategies.

(4) If applicable, summarize the results of prior resourcing actions highlighting the status of approved resources (e.g., all approved resources required and ready to implement, pending acquisition for implementation, etc.) and/or mitigation strategies as the result of denied or partial approval of resources.

(5) Identify any resource reductions now available at the formal school for re-distribution within the MSC, TECOM, or USMC.

(6) Summarize the results of any prior validation efforts, as applicable.

(7) Identify the number of calendar days, specifically highlighting mitigation strategies with administrative hours and the transients, trainees, patients, and prisoners (T2P2), as applicable, considerations. The letter must explicitly state if there is any increase in training days. It should also emphasize the intent of maintaining an average of seven (7) academic hours per training day.

3. Staffing and Approval. Formal schools will submit POIs and supporting documentation to the appropriate POI approval authority. POIs (and OSS CDDs) require CG TECOM staffing or approval, as follows.

    a. TECOM. CG TECOM is the approval authority for all TECOM POIs not formally assigned or delegated to TECOM MSCs. POIs are submitted to TECOM PSD which facilitates staffing actions. Barring substantive standard or resource issues, formal schools should expect completion of staffing actions and CG TECOM approval within 30 days. *Note: Center for Naval Aviation Technical Training related OSS CDDs are either submitted to CG Training Command (TRNGCMD) or CG TECOM for staffing and approval.*

    b. MARFOR and MARFOR MSC Commanders. Per reference (a), MARFOR and MARFOR MSC commanders act as POI approval authorities for non-TECOM formal schools that fall directly under their cognizance. Non-TECOM formal school POIs are staffed to TECOM PSD for standards review and CG TECOM submits an endorsement to the POI staffing package. CG TECOM does not review or approve resources for non-TECOM courses.

    c. TECOM MSCs. Reference (a) outlines the delegation of POI approval authority to TECOM MSCs. POIs are submitted to the appropriate TECOM MSC, which conducts a compliance review and facilitates staffing actions. Generally, POIs are staffed to TECOM PSD MCSRB, G4 (ammunition), and G8 (formal schools travel support (FSTS)). POIs with any deviation from established standards will also include staffing to the appropriate TA in TECOM PSD. Formal schools should expect approval of POIs without substantive deviation from established policy, standards, or resources within 30 days. Substantive deviations are likely to exceed this timeline.

        (1) POI approval authorities may approve deviations that are not substantive in nature without CG TECOM authorization. POI approval authorities will submit a monthly roll-up of any POIs approved with degraded execution to TECOM PSD via Enterprise Task Management Software Solution (ETMS2), including the information required in paragraph 2002.4.c. This roll-up is meant to inform CG TECOM of POI deviation trends and to enable the tracking of any associated resource challenges.

(2) During routine compliance review and staffing actions, either the MSC CG or TECOM staff may recommend CG TECOM review and authorization of substantive standards and/or resource deviations. Approval authorities and TECOM staff will apply judgment when determining whether changes meet the substantive threshold. CG TECOM trusts the appropriate individuals will make sound threshold decisions and seek out guidance when in doubt.

(3) Any POI with substantive deviation from standards requires review and authorization by CG TECOM prior to approval. An example of a substantive standards deviation is the inability to complete T&R events that would result in a degradation of standards and a Marine not fully qualified for service in the FMF, such as the inability to live-fire a weapons system. Conversely, a non-substantive deviation may be a course including additional standard(s) when inclusion does not impact production (including attrition) or resources (including time to train). *The examples are intended to provide guidance but should in no way restrict the exercise of sound judgment when determining whether standards deviations require CG TECOM approval.*

(4) Any POI with substantive resource deviations requires review and authorization by CG TECOM prior to approval, particularly as it relates to ensuring service-level support for tracking and resourcing shortfalls and reducing time to train. *Any substantive growth in training days, including ITRO courses, requires CG TECOM review and authorization prior to approval.* In determining whether resourcing shortfalls are substantive, MSC and TECOM staff are encouraged to consider the likelihood the MSC can acquire the manpower, resources, or equipment on its own. For example, decisions may be guided by: (a) the level of commitment from an OccFld to compensate for structural shortfalls, (b) the ability of the MSC to reallocate funds to cover resource shortfalls, (c) the level of confidence equipment can be sourced via a TOECR, or (d) the impact to the FMF by any increase to the number of training days and, in the case of ITRO courses, the availability of alternate training venues. Depending on the extent of substantive resource deviations, POI approval authorities and TECOM staff may recommend submission of a training and education needs statement (TENS) according to the training and education requirements management system (TERMS), outlined in reference (u), in place of CG TECOM POI review. *Bottom line: CG TECOM will oversee resourcing shortfalls beyond the capacity of the MSC and any growth in training days.*

5. <u>Approval Letters</u>. The POI approval letter, not the POI itself, obligates resources as feasible. At no time will a subordinate MSC unconditionally approve a POI it cannot resource. The POI approval authority will issue approval letters only using the terminology below:

a. "<u>Approved</u>". This unconditional approval is used for all policy-compliant, standard-neutral, and resource-neutral POIs. Upon approval, formal schools are expected to execute the approved POI as soon as possible. For newly validated POIs, formal schools will report commencement to the approval authority. Revised POIs should be executed during the next course iteration with any rationale for delayed execution reported to the approval authority.

b. "<u>Approved with existing resources</u>". This unconditional approval allows formal schools to execute the POI within existing resources, where resourcing shortfalls do not substantively impact standards or result in degraded execution. This category of approval is used in the event follow-on

resourcing actions are necessary to optimize the POI, but the resourcing shortfall does not substantively impact the school's ability to produce a fully qualified Marine. The approval letter may contain guidance on distribution and prioritization of existing resources, but the basic tenet—unconditional approval—applies. As with the "approved" letter, formal schools are expected to execute the POI as soon as possible and report any delay in execution to the approval authority.

    c. "Approved with degraded execution". This conditional approval allows formal schools to execute the POI, but deviations to standards or resources result in degraded execution. This approval enables formal schools to make incremental improvements while resourcing actions continue in support of full execution (unconditional approval). In the event of resource-related degradations, the letter will explain the resources acquired and/or denied, the impact of non-approved resources, and follow-on resourcing actions. For standards-related degradation, the letter will explicitly approve or deny (with guidance) proposed standards modifications/downgrades and include any relevant risk mitigation guidance. If subsequent resource or standards-related changes resolve deviations, POI approval authorities will issue an unconditional approval letter and notify CG TECOM of the change via the monthly roll-up outlined in paragraph 2002.3.c(1).

    d. "Disapproved". Disapproval can happen for a variety of reasons; however, the reason will be clearly stated in the letter.

6. Prioritization. Formal schools and MSCs will prioritize POIs according to their impact on MOS production and/or PME requirements. Courses shall be resourced according to their priority level (e.g., lower-priority courses will be resourced after higher-priority courses). *The priority levels should not be confused with categories or tiers for FSTS funding.* POIs are prioritized according to the following criteria:

    a. Priority Level 1. All courses necessary for completion before primary MOS (PMOS) award. This also includes the Warrant Officer Basic Course, Officer Candidate School (OCS), and courses required for special duty assignments.

    b. Priority Level 2. All other MOS-producing courses that result in a necessary MOS, free MOS, exception MOS (EMOS), or additional MOS.

    c. Priority Level 3. All required resident and non-resident PME programs.

    d. Priority Level 4. PMOS skill progression, sustainment, recertification, and advance certification training for Marines already holding a PMOS. The requirements for these courses must be listed in the MOS manual or T&R manual (or equivalent). It must be clear that the requirement intends that every Marine in the MOS attend these courses.

    e. Priority Level 5. All other required courses that do not fit into the priorities above and are validated to meet Marine Corps and/or joint learning requirements. In general, these courses satisfy functional, non-MOS learning requirements for specific billets across the Marine Corps.

7. Course Identifier. The Marine Corps training and education enterprise uses CIDs to identify formal courses of instruction. A CID is a seven-

character TECOM-approved alphanumeric code for a specific formal course of instruction. The formal school management checklist requires the approval of all POIs on a triennial basis, at a minimum. Reference (r) details the circumstances where CIDs are assigned, deactivated, and reactivated.

    a. <u>Annual Reporting</u>. In conjunction with the formal school management checklist and the CID requirements outlined in reference (r), MSCs shall submit an annual report detailing the date of the last approved POI for every course taught at every subordinate school for which they are the approval authority. Reports will be submitted to TECOM PSD via ETMS2, no later than 1 October, with the status (approved, delinquent, or to deactivate) of each course under their purview. If a formal school does not fall directly under TECOM (e.g., Expeditionary Operations Training Groups (EOTG), Marine Security Guard, Recruiter's School, etc.), the report will be submitted to TECOM PSD via the appropriate POI approval authority.

    b. <u>Delinquencies and Deactivations</u>. In the event a formal school has delinquent POIs, annual reports shall include a POA&M outlining submission timeline for all outdated POIs and/or identification of CIDs requiring deactivation. Reference (r) details the circumstances that require CID deactivation; however, an MSC may submit a CID for deactivation if the course is no longer required or attended.

2003. MIRROR-IMAGE PROGRAMS OF INSTRUCTION

1. For mirror-image courses under the cognizance of a single POI approval authority, the approval authority shall establish supporting policy to ensure standardization between those schools.

2. <u>Designated Lead</u>. For courses taught at multiple locations not under the same POI approval authority that execute duplicate POIs (e.g., marksmanship, Marine Corps Water Survival School, Marine Corps Martial Arts Program, and EOTGs), CG TECOM will designate a lead MSC. The lead MSC shall coordinate and oversee joint learning analyses (LA), CRBs, and POI evaluations. In these cases, representatives will convene from all formal schools that teach the respective course(s) to ensure the curriculum remains consistent between course locations. The lead MSC/POI approval authority with direct oversight of the mirror-imaged course will review and approve the parent POI. Upon approval of the parent POI, all mirrored schools will submit a location-specific CDD (i.e., section I) with mirror-imaged elements (i.e., section II through V) to the appropriate POI approval authority to include staffing to the lead MSC. The lead MSC will ensure standardization across non-location specific elements of CDDs and across sections II through V. Final approval will remain with the appropriate POI approval authority.

3. <u>No Designated Lead</u>. For courses taught at multiple locations that execute mirror-image POIs with minor variations (e.g., Marine Corps Recruit Depots (MCRD), Schools of Infantry, etc.), the POI approval authority shall coordinate and oversee the LA, CRBs, and POI evaluation to ensure standardization and policy compliance. Due to differences in climate, time, space, and logistics; POI sections II through V will account for location-specific considerations but mirror critical events by phase, course material, and structure/schedule.

4. <u>Instructor and Academic Faculty Development</u>. During the conduct of joint review boards, formal schools with mirror-image POIs will also review their

instructor development (*see Chapter 5*) to ensure consistency and standardization across efforts.

5. <u>Mirror-Imaging and Piloting</u>. A mirror-imaged course may submit a request for piloting under piloting guidelines (*see Chapter 4*); however, the results of a pilot will not be implemented into an approved POI until and unless it is integrated into the parent POI (lead MSC) or all mirrored POIs (no designated lead), following coordination and concurrence from all stakeholders.

CHAPTER 3

DEVELOPING AND MAINTAINING COURSE AND LESSON FILES

3000. INTRODUCTION

1. Formal schools develop and maintain master course files (MCF) and master lesson files (MLF). The MCF is a compilation of living documents required to operate a course. The MLF is a compilation of living documents needed to implement a lesson. All formal schools will manage MCFs and MLFs based on the guidelines outlined in the subsequent paragraphs.

2. MCTIMS is the authoritative database for POI management. Formal schools will use MCTIMS functionality to develop and manage courses and lessons and to perform other schoolhouse functions as outlined in Appendix A, *MCTIMS Guidance. EXEMPTION: Marine Aviation Weapons and Tactics Squadron One (MAWTS-1) will only be required to submit section I of CDD. POIs not embedded within the Weapons and Tactics Instructor (WTI) course (i.e., not outlined in the MAWTS-1 Course Catalog) will adhere to the abbreviated CDD policy outlined in the subsequent paragraphs.*

3001. MASTER COURSE FILES

1. Formal schools will maintain MCF data in MCTIMS or the eLE. MCFs will include the course audit trail (CAT), course structure and schedules, and reference materials. These files will be maintained for three (3) years following this guidance and academic standing operating procedures (SOP).

2. Course Audit Trail. Formal schools shall maintain a CAT review log to record historical data of course and lesson changes associated with course life-cycle management. CATs are used to track the status of the curriculum taught by the formal schools and as a tool for scheduling, maintaining, and managing POI modifications. Schools will develop and maintain a CAT in the manner most useful for the school (e.g., excel spreadsheet, etc.). The CAT will include all reference material that supports POI changes, including but not limited to the following:

    a. Record of Changes. The record of changes page is a chronological log of all changes made to a POI. Formal schools will maintain commander's decision briefs or other evaluation trends and reports that support the change. Each entry must indicate the change number, date of change, date received, date entered, and the signature of the individual entering the change. Changes entered in the change log will not impact learning outcomes, standards (e.g., MOS requirements, task list, LO changes resulting in downgrades, etc.), capacity, or resources (including course length), as these large changes require submission of a new POI.

    b. Record of Proceedings. The ROP archives results and recommendations from CRBs. MCFs will include the most recent ROP, along with supporting documentation. Formal schools should also retain all ROPs supporting historic changes as this best practice provides a course history which is useful to build institutional memory, support organizational stability, and reinforce previous lessons learned. Documentation supporting current changes will minimally include formal school evaluation report (FSER) data and results or other documents that directed or recommended changes to the course.

3. <u>Course Schedules and Structure</u>. Formal schools must maintain a course schedule for each iteration that matches the approved POI. Schedules should be maintained for one year. If the course schedule does not include lesson designators, lesson titles, methods, and academic hours, the formal school will maintain a course structure outlining these factors. Local SOPs will document the alignment of course structures to course schedules.

4. <u>References</u>. MCFs will include references associated with POI development and change, including but not limited to the T&R manual, MOS manual, and supporting doctrinal publications.

3002. MASTER LESSON FILES

1. Formal schools will develop a MLF for each lesson within a POI. The MLF will be maintained in MCTIMS or the eLE. *EXEMPTION: MAWTS-1 Course Catalog meets the requirement for the MLF. Minimum requirements are based on the MAWTS-1 POI. MAWTS-1 CO is the approval authority for MAWTS-1 POIs as documented in the MAWTS-1 Course Catalog.*

2. <u>Development and Review</u>. MLF development occurs with POI creation and prior to implementation. MLF revision occurs in conjunction with course and associated POI revisions. Instructors and faculty responsible for the associated lesson should review the MLF annually to ensure accuracy. Recommended but not required components of MLFs include items such as change logs, historical archives of previous versions, relevant LA documentation, internal resource support or coordination documents, or any supplemental materials useful to support continuity across personnel turnover. MLFs will minimally contain the items listed below.

   a. <u>Concept Cards</u>. Formal schools will include the associated concept card.

   b. <u>Facilitation Guide</u>. Formal schools will develop facilitation guides, in support of each lesson. The guide is a comprehensive document detailing the strategy to facilitate a lesson and the achievement of LOs and PLOs/SLOs. The guide includes all information required for instructors to successfully facilitate the lesson, including but not limited to stating associated LOs and PLOs/SLOs, lesson designation information, supporting references and materials, assessment strategies, and risk mitigation strategies. The guide shall be signed and dated by the approval authority designated in the academic SOP.

   c. <u>Learner Guide</u>. Formal schools will develop learner guides, in support of each lesson. The guide is a comprehensive document detailing all information required for learners to complete the lesson.

   d. <u>Media</u>. Schools are not required to maintain media within the MLF, however, the facilitation guide and/or learner guide, as applicable, will contain access instructions or a hyperlink to associated media.

   e. <u>Assessments and Exams</u>. Formal schools will maintain all current exams and assessments.

   f. <u>Risk Assessment</u>. The MLF will record safety controls, cease training (CT) criteria, and CT procedures. Formal schools will comply with the requirements of reference (s) and (t). All concept cards will record risk and lessons will have a current JRAT (or DD Form 2977) located in the MLF.

RAWs shall be updated at least annually but may be updated more frequently given any lesson changes that impact the overall risk for injury, loss of life, or significant damage to equipment. HRT must be approved by the general/flag officer with cognizant approval authority. *EXEMPTION: MAWTS-1 is staffed with a Department of Safety and Standardization to establish internal policies for risk management and mitigation; therefore, MAWTS-1 is exempt from certain risk requirements such as maintaining a RAW with each MLF.*

3003. PROGRAM OF INSTRUCTION

1. A POI primarily consists of five (5) sections: CDD, a summary of hours, a scope of annexes, concept cards, and student performance evaluations. Formal schools will develop each of these sections following the below guidelines.

2. Section I (CDD/OSS CDD). The CDD summarizes the course title, location, CID, Other Service Course Number (OSCN) (if applicable), PLOs, SLOs (if applicable), scope, length of course, breakdown of curriculum, class capacity, frequency, TPD and prerequisites, MOS received (if applicable), funding, reporting instructions, staffing requirements, resource requirements, DoD Identification Code requirements (if applicable), instructor computation worksheet (ICW), and a task list linking LOs to T&R events. The CDD is a crucial document in TECOM resourcing activities and training and education requirements validation. Accurate reporting of resources and requirements is essential to service-level management and is required to compete for resources in the program objective memorandum (POM) process. Failure to provide accurate resourcing data in the CDD jeopardizes future funding. Formal schools shall complete all 24 elements per Appendix C, *CDD*, and the guidance below. *EXCEPTIONS: OSS CDDs do not require all 24 elements of the CDD, particularly if the courses are DoD Directed or Consolidated. OSS CDDs shall include only those Marine Corps instructional resources utilized by a course. MAWTS-1 and MCU courses do not require a POI and only require approval of a CDD triennially and a CDD review annually.*

   a. Annual Review. Formal schools will review all CDD elements of the POI annually, or more frequently if required, in conjunction with higher headquarters guidance for insertion into the POM process. Formal schools will validate administrative, production/TIP, standards, and resource items and submit issues to the POI approval authority. Where appropriate, POI approval authorities will staff the following to TECOM PSD via ETMS2 with a 15-day suspense.

      (1) Administrative changes (e.g., course title, location, scope, reporting instructions, TPD, prerequisites, etc.) will be communicated to the POI approval authority by routing a standard naval letter via the administrative chain of command.

      (2) Production/TIP changes (e.g., maximum class capacity, optimum class capacity, minimum class capacity, class frequency, length (peacetime), or length (mobilization), etc.) will be communicated to the POI approval authority to determine the need for out-of-cycle POI submission.

      (3) Standards changes (e.g., MOS received, curriculum breakdown, or task list) will be communicated to the POI approval authority to determine the need for an out-of-cycle POI submission.

(4) Resource changes (e.g., POI tier level, funding, instructor staffing requirements, school overhead requirements, training/education support requirements, or resource-related CDD notes) will be communicated to the POI approval authority and TECOM PSD to determine the need for out-of-cycle POI submission.

b. <u>Task List</u>. The task list must only include all ITEs relevant to the scope and TPD of the course. Relevant JLOs will be listed in the task list notes. Formal schools shall also use task list notes to identify any downgrade or mirror-image standards deviations.

c. <u>Purpose (Outcomes)</u>. The PLOs, developed in accordance with the requirements outlined within this guidance, are included in the POI for approval.

d. <u>Resources</u>. Resources are recorded as follows.

(1) <u>Instructor Staffing</u>. Instructor staffing requirements are based on the academic hours and computed in MCTIMS in the ICW of the POI. It allows the school to reflect the instructor staffing requirements for a course by billet identification code (BIC), grade, billet description, rank, service, or MOS. It also allows identification of whether the position is filled or vacant. The ICW and ICW notes are included in Annex A. Formal schools will use the ICW notes to annotate and justify any requests that deviate from the ICW. *EXCEPTION: In formal schools with ITRO agreements, instructor staffing is computed using the ITRO manpower computation formula.*

(2) <u>School Overhead Requirements</u>. School overhead requirements reflect the total personnel overhead requirements for the entire school (i.e., personnel detailed to support that POI full-time but not in an instructor role) by BIC, grade, billet description, rank, service, or MOS. It also allows identification of whether the position is filled or vacant.

(3) <u>Training/Education Support Requirements</u>. This field lists resource requirements other than personnel. It allows the school to list all requirements and specifically emphasize the portions that exceed current availability (e.g., facilities, equipment, etc.).

e. <u>Joint Instruction/Other Service School POIs</u>. For courses at other service schools, course data will be reviewed at a minimum of every three (3) years, and the OSS CDD will be submitted to MCTIMS. Formal course revision is only authorized when an updated POI and a cover letter detailing the proposed revisions are approved by the appropriate authority.

f. <u>Prerequisite Waivers</u>. Given prior CG TECOM approval, COs are authorized to waive prerequisites given the following limitations.

(1) COs waiving prerequisites will track performance and submit a waiver progress report quarterly to the POI approval authority.

(2) At no time will civilians of any source (including government employees, contractors, or external agencies) attend enlisted 1000-level Marine Corps courses (courses with student type code 0EE or 1E requirements in the current TIP). Civilians may enroll in other service 1000-level equivalent courses if permitted by other service policies.

3. Section II (Summary of Hours). Formal schools will determine and record the appropriate amount of academic and administrative time required to implement the POI. Annexes A-Y are for academic concept cards and Annex Z is for administrative concept cards.

   a. Academic Concept Cards. Academic concept cards will reflect the time devoted to LOs and lesson purpose instruction or evaluation. Not all academic concept cards will contribute to instructor computations or formal time calculations.

      (1) With Instructor and Formal Time. Formal schools will use concept cards to reflect the formal time instructors engage students in support of PLOs, SLOs (as applicable), LOs, and lesson purpose instruction or evaluation. Formal schools will ensure the concept card reflects the actual time value and the proper student-to-instructor ratio.

      (2) Without Instructor or Formal Time. If a formal school uses pre-work (i.e., before the resident phase of the course), post-work (i.e., after the resident phase of the course), or homework (i.e., within the resident phase of the course) tied to LOs, formal schools will use concept cards and the hours will not count towards formal academic time or instructor computations. Formal schools will select the smallest time value possible for each method used on the concept card (e.g., such as .01 hours) and will enter student-to-instructor ratios with no instructors, leaving any time associated with the method off the ICW in the CDD Section I. The notes section of this concept card must reflect: the asynchronous nature of the concept card and the associated phase (e.g., pre-work, post-work, or homework), where learners are held accountable (unless learning assessment is incorporated into the learning concept card), and the time expected for learners to complete the informal lesson. The amount of time will not exceed three (3) academic hours per day and must be zero (0) administrative hours per day.

      (3) Without Instructor. If a formal school uses formal time without instructor oversight, the formal school will use a concept card without instructor computation. Formal time applies when a learner is engaged in learning or evaluations without instructor oversight, such as blocks of time that permit learners the freedom to study or prepare for upcoming events (e.g., professional study, preparation time, etc.) or to engage in evaluations with automated feedback mechanisms (e.g., Moodle quizzes, etc.). Formal schools will select the actual time value associated with the event and enter student-to-instructor ratios with no instructors, leaving any time associated with the method off the ICW in the CDD Section I. The notes section of this concept card must reflect, as applicable: how learners are held accountable and how learners receive feedback on the accountability event. The intent of formal time without instructor engagement is to enhance learning and find efficiencies within a course; therefore, formal time without instructor engagement is not, in and of itself, a rationale for lengthening a course.

      (4) Without Formal Time. Formal schools will use a concept card to reflect instructor requirements not tied to formal time. For example, to permit one-on-one individual coaching or counseling while the group of learners engages in professional study or preparation time already allotted time on the schedule. Formal schools will select the smallest time value possible for each method used on the concept card (e.g., such as .01 hours) and will enter actual student-to-instructor ratios. The notes section of the

concept card must highlight how time is accounted for in the schedule (e.g., point to the associated professional study or preparation time concept card). The intent of informal time with instructor engagement is to enhance learning and find efficiencies within a course; therefore, informal time with instructor engagement is not, in and of itself, a rationale for additional instructors. Informal time with instructor engagement will not count towards instructor computation.

b. Administrative Concept Cards. Administrative time refers to the time necessary to ensure the smooth operation of a POI. Administrative time will account for all administrative formal time with or without an instructor.

(1) Formal Time with Instructor. Formal schools will create concept cards that account for all instances an instructor is in contact with students as required by TECOM directives and various Marine Corps orders. This can include but is not limited to physical training, chow, equipment draw/issue, transit, field day, overnight duty, and remediation. Instructor-supported administrative concept cards may or may not contribute to formal blocks of time. All instructor-supported concept cards will reflect the actual student-to-instructor ratio necessary to regularly implement in the existing formal school facilities available, as a factor of the maximum class size (e.g., half the class at one time or in smaller groups as may be necessary to rotate through a limited size computer lab or simulator room, as examples). The intent of using the actual student-to-instructor ratio is to directly support recurring implementation at the formal school rather than generic reporting. Instructor-supported, administrative concept cards with formal time will reflect the actual time value, and instructor-supported, administrative concept cards without formal time will reflect the smallest time value (e.g., such as .01 hours).

(a) Individual remediation will reflect student-to-instructor ratios and will reflect the smallest time value. Collective remediation will not be captured in an administrative concept card; the associated evaluation concept card (i.e., academic) will include remediation reflecting the actual time and student-to-instructor ratio.

(b) Physical training (PT) will be included in academic concept cards when the specific PT event has an LO based on ITEs derived from the same T&R manual as the other course ITEs. All other PT will be included in administrative concept cards, for instructor computation, and will not have formal time associated (e.g., actual student-to-instructor ratio and smallest time value). All PT in this category will be tied to PT events in reference (o).

(c) Reference (v), Marine Corps Values Program, loosely articulates the requirement for foundational (i.e., MCRD/OCS/The Basic School (TBS)), reinforcement (i.e., Marine Combat Training (MCT)/MOS/PME), and sustainment (i.e., FMF/SE) implementation. The foundational requirements are met through academic concept cards utilizing 1000-level events from reference (o) at MCRD, OCS, and TBS. MCT will incorporate Marine Corps Skills (MCS) T&R events for the purpose of reinforcement; however, PME and MOS POIs will not duplicate the 1000-level MCS T&R events for the purpose of reinforcement. Reinforcement in MOS and PME POIs is accomplished through integration with the normal battle rhythm of the school and not via concept cards with formal instructors and time commitments.

(2) <u>Formal Time without Instructor</u>. Formal schools will create concept cards that account for the formal time required to ensure the smooth operation of a course. As overhead BICs cannot be assigned to a concept card, formal schools will enter the actual time value and will enter student-to-instructor ratios with no instructors, leaving any time associated with the method off the ICW.

c. <u>Formal Time Calculations</u>. Formal time will account for all academic and administrative time required to execute a POI. The minimum peacetime day is eight (8) hours. The minimum peacetime course week is five (5) working days. The minimum peacetime course week is 40 hours.

(1) Training day (hereafter referred to as course days) and calendar day calculations are in support of determining actual duration and funding sources. As such, all calculations will accurately reflect duration.

(a) The number of course days is determined by "academic formal time" plus "administrative formal time" divided by "minimum peacetime day." In other words, course days = (academic formal time + administrative formal time) / minimum peacetime day. For example, a course with twenty-two (22) academic formal hours and two (2) administrative formal hours is three (3) course days. Course days = (22+2)/8; 24/8; 3. The course day calculation does not constitute, in and of itself, authorization to extend current POIs. Formal schools will continue to focus on minimizing T2P2 to the greatest extent possible.

(b) The calendar days must reflect the whole number of days between the report date and the graduation date. The number of calendar days is determined by "course days" plus "non-course days." Non-course days include holidays and liberty. During certain times of the year, the calendar day calculation may vary due to factors such as weather delays and the number of holidays. At no time will the calendar day include a "bank" of administrative time, as a block of time before course convene date or after the graduation date. Report dates for all courses will be one day prior to the start of the course and detach dates will be no more than one day after graduation.

(2) Formal schools should, to the greatest extent possible, equally distribute administrative time across the POI. In instances where equal distribution of administrative formal time across the POI is not feasible (e.g., supporting establishment support only available during training time, administrative requirements such as gear issues not practically distributed across days, etc.), formal schools will employ mitigation strategies to maintain an average of seven (7) academic hours per training day. The CO's cover letters will specifically address the average and mitigation strategies.

(3) Formal schools should not include more than an average of one hour of lesson purpose time per week (excluding naval integration). If a school requires more lesson purpose time, the CO cover letter will include rationale, justification, and an assessment of risk caused by lesson purpose limitation.

4. <u>Section III (Scope of Annexes)</u>. This section carries a subheading, and academic subjects, and details a description of the scope of each annex in the POI. The scope of annexes is also used to record any optional SLOs.

Formal schools will annotate in section III if there is a difference in course scope during peacetime and mobilization.

5. Section IV (Concept Cards). The bulk of the POI is contained in section IV and provides a snapshot of all lessons, examinations, and administrative events. Concept cards have both a primary and secondary purpose. The primary function of a concept card is to organize the formal school's plan for learning experiences by lesson, towards the service-level learning requirements assigned to the course. The secondary function is to provide a way for formal schools to plan and organize resources to do so. All concept cards and POIs must be oriented to support the implementation and arrangement of learning experiences at formal schools, not generic reporting. Formal schools shall determine the best method to align concept cards with physical locations and facilities to best support course scheduling and the local resource deconfliction process. The intent is to first serve implementation at the school and second serve as higher headquarters reporting.

    a. Concept Card Type. Formal schools create administrative, lesson purpose, task-oriented, and exam concept cards.

        (1) Administrative. Administrative concept cards are used to record the formal time required to ensure the smooth operation of the course.

        (2) Lesson Purpose. A lesson purpose concept card will have a clearly defined lesson purpose statement reflecting the lesson intent. The lesson purpose should align with PLOs or SLOs.

        (3) Task-Oriented. A task-oriented concept card will identify the instructional content related to LOs.

        (4) Exam. Each initial exam requires an exam concept card. Formal schools may retest, as a remedial action, but it must be accomplished within existing time and resources. Retesting hours will not count toward the 40-hour academic week.

    b. Ammunition. Whenever a lesson requires the use of ammunition by students or by the instructional staff in support of the lesson, the concept card for that lesson will include a table describing those requirements.

    c. References. Formal schools will include all documents referenced in the LOs within the concept card references. If feasible, reference information should include the detailed location of specified information.

6. Section V (Student Performance Evaluations). Formal schools will document standards of performance and evaluation procedures. Formal schools will convert all ITEs assigned to a course into LOs. The LOs establish the scope and basis of student evaluation. Student evaluation must be detailed and include, at a minimum, the evaluation philosophy (i.e., pass/fail, grades, etc.), evaluation methods (e.g., eLE, written, performance, remediation, etc.), fitness reports or junior enlisted performance evaluation system marks (if applicable), and procedures for academic failures (i.e., remediation/recycle/MOS re-designation). POI approval authorities will ensure evaluations are limited in scope to LOs derived from ITEs in the course task list and do not include "exit criteria" or other novel verbiage intended to edit course prerequisites or graduation requirements without CG TECOM approval.

CHAPTER 4

EVALUATION IN MARINE CORPS FORMAL SCHOOLS

4000. INTRODUCTION

1. The concept of organizational culture introduced in reference (n) binds together three sets of ideas: learning, organizational learning, and organizational culture. Habit in humans is to culture in organizations — there are visible aspects, agreed-upon values, and underlying deeply held assumptions. Organizational learning is essentially about collective adaptation and generation through a deliberate search for and openness to feedback loops which includes facilitating and collectively sharing the learning of members. This requires a continual campaign of learning innovation and assessment starting with the individual learner through to the results in readiness in the FMF/SE.

2. In Marine Corps training and education, program evaluation practices that drive meaningful change ensure courses meet the needs of the FMF/SE. Reference (a) requires formal schools to execute formal school evaluation plans (FSEP). Formal schools must systematically collect, analyze, interpret, and act upon data compiled from FSEPs to ensure their POIs remain relevant. Evaluation approaches vary from school to school, based on unique missions and desired end states. However, the intent and guiding philosophy remain constant across schools and programs. All schools will develop and enact FSEPs based on internal and external evaluation criteria, program review cycles, and the need to balance change and stability.

4001. INTERNAL EVALUATION

1. Formal schools will develop and enact academic SOPs to evaluate the products of internal procedures for designing, developing, and implementing POIs. Academic SOPs will establish local methods for evaluating internal procedures. Formal schools may use checklists to provide continuity and standardization to the process.

2. Evaluate Learning Requirements. Formal schools analyze learning requirements (e.g., MOS manuals, T&R manuals, TIP requirements, etc.) to design POIs that accomplish stated requirements. Formal schools will evaluate the quality of POIs. Potential questions for consideration include the following:

    a. Are PLOs a reflection of the knowledge, skills, and dispositions expected of a learner upon completion of the course?

    b. Do PLOs and SLOs (as applicable) link back to the T&R/MOS manuals and reflect the needs of the customer in the FMF/SE?

    c. Do LOs reflect the actual learning environment and adequately capture standards reflected in the T&R?

3. Evaluate Learning Design. Formal schools design learning and evaluation methods. To the greatest extent possible, formal schools will use active, learner-centered methodologies. Formal schools will ensure evaluation is limited to evaluating criterion established in the MOS/T&R manual. Potential questions for consideration include the following:

a. Are learning experiences designed to enhance active, learner-centered methods that appropriately replicate on-the-job requirements?

b. Do assessment and evaluation tools measure what they are intended to measure? And do they consistently measure what they are intended to measure across changing populations and/or situations?

c. For MOS-producing courses, are course prerequisites, exit criteria, and evaluation methods limited to the requirements reflected in the MOS and T&R manual? Is each ITE reflected in an LO and is each LO evaluated to standard?

4. Evaluate Course Development. Formal schools create and evaluate the MLF, MCF, POIs, and supporting student-facing and supplemental materials. Potential questions for consideration include the following:

a. Is the course structure sufficient to organize the learning experience to meet the learning requirements defined by the assigned T&R/JLO task list?

b. Does curriculum support associated LOs towards PLOs and optional SLOs?

c. Are the lesson materials appropriate to the intended learning experience?

d. Is the POI complete and accurate according to directives?

5. Evaluate Implementation. During the implementation phase, formal schools facilitate learning experiences and execute instructor and faculty development programs (IFDP). Academic SOPs will establish local methods to validate student performance, instructor performance, the learning environment, and course attrition/recycle rates as guided by the following:

a. Student Learning Assessment. In support of FSEPs, assessment is the systematic collection, review, and use of information to improve learning and development. FSEPs will account for direct and indirect assessment of learning and development.

(1) Direct Assessment. FSEPs will clarify procedures for gathering and analyzing student performance against stated LOs and PLOs (and SLOs, as applicable). Direct assessment includes learners' performance of standards-based LOs within a lesson, as well as demonstrated task proficiency and attribute progression across a course.

(2) Indirect Assessment. FSEPs will clarify procedures for gathering and analyzing secondary evidence of learning, such as learner or instructor perceptions of learning effectiveness.

b. Instructor and Academic Faculty. Formal schools will create SOPs for assessing instructor and academic faculty readiness. Robust internal evaluations of individual performance through data gathered from multiple sources should be developed and implemented to continuously refine learning experiences.

c. Learning Environment. Formal schools will create SOPs for assessing the learning environment to ensure it meets the program's requirements.

Plans should account for the appearance, operation, condition, suitability, and appropriateness of instructional equipment and environments. Plans should also account for preventative maintenance or other local methods of ensuring equipment and facilities remain operable.

    d. <u>Course Attrition/Recycle Rates</u>. Formal schools will create SOPs for tracking, analyzing, and mitigating, as necessary, student attrition/recycle rates over time. Additionally, entry-level schools will ensure standardized re-assignment policies are established in the event a student is unable to meet MOS standards.

4002. EXTERNAL EVALUATION

1. External evaluation includes the formal school's external engagement plan and external engagements that occur through inspections and assist visits.

2. <u>External Program Evaluation</u>. Formal schools must have an established external evaluation plan to gauge course effectiveness. External evaluation should focus on the extent and effect of learning transfer.

    a. <u>Extent of Learning Transfer</u>. Formal schools will focus external evaluations on the extent of learning transfer. Are the course graduates able to make decisions and perform tasks proficiently on the job without assistance and in contexts that resemble those encountered within the learning experience (i.e., near transfer)? Are course graduates able to make decisions and perform tasks proficiently on the job in changing situations that do not resemble those encountered within the learning experience (i.e., far transfer)?

    b. <u>Effect of Learning Transfer</u>. Formal schools will focus external evaluation on the effects of learning on the learner and the institution. What are the positive and negative impacts, to the Marine Corps and unit, of what the graduate learned to "do" and how the graduate learned to "be" as a result of the learning experience? What are the positive and negative impacts, to the individual and the individual's relationships?

3. <u>External Evaluation Methods</u>. Formal schools will select the evaluation methodologies most appropriate to local needs and resources. The following highlights some methods a school may use to evaluate courses. The evaluation must comply with the requirements of reference (w). *Note: while course and program evaluation surveys are exempt from the requirement for institutional review board approval, they are not exempt from other programmatic requirements. For example, surveys must still contain a privacy act statement, be confidential, and be voluntary.*

    a. <u>Post-Graduate Surveys</u>. Formal schools may use electronic questionnaires to survey graduates currently performing on the job. Questionnaires assess how well graduates feel the course prepared them for their job requirements but can also be designed to discover emerging FMF requirements (e.g., new equipment or content not covered in the course). They should be sent to graduates approximately 90 days following course completion. Formal schools may send graduate surveys up to 15 months after course completion, where extenuating circumstances delay graduates from performing job requirements (e.g., a backlog of obtaining security clearances).

b. <u>Post-Graduate Supervisor Surveys</u>. Formal schools may use electronic questionnaires to survey supervisors of graduates. The purpose of the survey is to gather information relevant to determining how well the course prepared graduates for duty assignment requirements. Formal schools develop surveys to assess supervisor perceptions of how well graduates perform on the job though they may also be used to collect information on emerging FMF requirements. Formal schools should send supervisor surveys no earlier than 90 days and no later than 15 months following the graduate's completion of the course.

c. <u>Field Survey/Site Visit</u>. Field surveys, site visits, and physical interviews provide an opportunity to observe recent graduates as they perform their duties on the job. These visits can aid schools in identifying job-setting requirements or assessing the performance of graduates on the job. It also provides an opportunity for formal school personnel, who possess the requisite knowledge of the course, to conduct interviews and observations to make course improvement recommendations.

d. <u>Marine Corps Center for Lessons Learned</u>. As a routine part of data collection, formal schools should ensure they are on the distribution list and review all reports that apply to their MOS/special skill. Marine Corps Center for Lessons Learned (MCCLL) reports contain valuable information that may aid a formal school in modifying methodologies or otherwise improving instructional programs. MCCLL reports, unit after action reports, and other lessons learned information can be accessed on the MCCLL sites listed in Appendix A, *Online Resources*.

4. <u>Reporting Results</u>. Reference (a) requires TECOM MSCs to ensure formal schools enact FSEPs. Evidence of an FSEP includes the plan itself and biennial FSER. Formal schools will complete FSERs in conjunction with status of command turnover at the start of a new commander's tour. The report should detail the following:

a. FMF/SE assessment of transfer of learning.

b. FMF/SE assessment of the product to the mission of gaining unit.

c. FMF/SE assessment of gaps in training and education.

5. <u>Inspections</u>. FSEPs should address the use of inspection and assist visit reports.

a. <u>Inspection Program</u>. According to reference (y), the Inspector General Marine Corps (IGMC) Inspection Program (IGMCIP), which includes inspections conducted by the IGMC and the Commanding General Inspection Programs (CGIP), support institutional and foundational readiness. Formal school inspections are a vital aspect of creating a feedback loop to higher headquarters regarding training, education, accountability, and readiness. Additionally, they provide formal schools with the opportunity to receive valuable feedback designed to enhance their courses.

(1) All formal schools across the Marine Corps are subject to inspections under the IGMCIP. Per references (a) and (x) all inspections of formal school functions contained in formal school management policy checklist will be conducted under the auspice of TECOM PSD.

(2) In accordance with the IGMCIP, a functional area sponsor (FAS) is the HQMC manager responsible for a functional area, defined as a HQMC program conveyed through a Marine Corps Order or NAVMC directive. At the direction of CG TECOM, the formal school management (FSM) supervisor located within TECOM PSD serves as the FAS and advocates on behalf of the functional area and associated policies, supports inspections under the IGMCIP, and maintains the functional area checklist (FAC).

(3) The formal school management FAC is reviewed and updated annually by the FAS per references (x) and (y). The IGMC website provides the central listing of all current, relevant, and supportable FACs. The checklist may be accessed using the link provided in Appendix A, *Online Resources*.

(4) For TECOM CGIP-related inspections, TECOM will coordinate inspections and scheduling with MSCs, may invite MSC inspectors, and will report results to CG TECOM via the appropriate TECOM MSC CG.

b. MOS Inspections. Some MOSs have inspection teams that visit the FMF/SE to ensure adherence to the standards required by the Marine Corps. These visits provide data that reveals the strengths and weaknesses of MOS performance within the FMF/SE. Where applicable, formal schools will identify the use of such data and the methods for determining whether performance issues are related to the schoolhouse, the FMF/SE, or both.

c. Command Assist Visits. Assist visits are available to MSCs and formal schools to identify strengths and weaknesses of local policies and practices including but not limited to FSEPs, IFDPs, and compliance with rules and regulations.

4003. COURSE REVIEW CYCLES

1. Formal schools conduct reviews to support local improvements and the broader Marine Corps training and education system. Formal schools will manage data in support of course reviews that promote continuous improvement.

2. Data Management. FSEPs must identify local procedures for collecting, managing, analyzing, interpreting, and summarizing data. This should include identifying the billets responsible for data means, ways, and ends. Formal school data collection and management practices and policies should align with and support the overall course evaluation cycle to inform decisions on improvement at the local and institutional levels.

3. Learning Experience Review Boards. The purpose of a learning experience review board (LERB) is to enhance POI effectiveness through small changes based upon meaningful FSEP evaluation data and existing learning requirements. The conduct of any LERB is the formal school commander's responsibility including membership, funding, agenda and action items, and reporting proceedings, and will be documented in academic SOPs. To ensure courses meet the needs of the FMF/SE, formal schools will include adequate FMF/SE representation. Formal schools should also invite OccFld managers and TECOM TAs. *EXEMPTION: MAWTS-1 conducts an internal POI revision for each WTI course through its Curriculum Review Committee.*

a. Scope of Local Change. LERB recommendations will generally not impact learning outcomes, standards (e.g., MOS requirements, task list, LO changes resulting in downgrades, etc.), capacity, or resources (including course length). The formal school may immediately implement small changes

provided they are documented within the CAT and supported by a LERB Memorandum for the Record (MFR).

    b. Scope of Changes that Require Validation. LERB recommendations verified by the formal school commander with impact on learning outcomes, standards, capacity, or resources require oversight and validation. Large changes requiring oversight should be supported by a LERB ROP rather than a LERB MFR. As a general rule, large changes initiated by a formal school require validation via pilot.

        (1) Piloting is the preferred method for validating large changes, including standard and resource changes initiated by a formal school or emerging requirement beyond the scope of an existing course (see section 4004).

        (2) By exception, a formal school commander may deem large changes to an existing course are more appropriately validated at first implementation (e.g., negative MOS implications, negative FSTS implications, etc.). In these instances, the CO's cover letter will include the rationale and validation plan details in the updated POI submission package (see section 2002).

        (3) Formal school commanders and POI approval authorities are encouraged to first optimize and reallocate existing resources to address large changes. POI approval authorities will closely analyze and confirm any resource growth, with the intent to minimize, before forwarding unresolved shortages to CG TECOM. *Any growth in time to train requires CG TECOM review and authorization.*

    c. Training and Education Needs Statement. Any LERB recommendation that identifies an emerging requirement (e.g., T&R events do not exist, T&R events exist but are not currently tied to the course, etc.) requires the submission of a TENS via the TERMS following reference (u). The formal school will not initiate a TENS on emerging learning requirements. The TENS will either be initiated by the FMF/SE, OccFld manager, or external representative(s) who identified the emerging requirement during the LERB or by the POI approval authority. A key enabler in TECOM's ability to adequately capture requirements is OccFld and FMF/SE identification of critical learning gaps and emerging requirements.

4004. COURSE INNOVATION THROUGH PILOTING

1. This guidance rescinds authorities to experiment granted in references (z) and (aa) and the authority to conduct proofs of concept (POC) granted in prior versions of this guidance. Piloting is the streamlined means for innovating courses.

2. Pilot. Piloting is the preferred method for validating instructional innovations, particularly those with resource implications, or emerging learning requirements. The following examples illustrate potential use cases.

    a. Emerging Learning Requirement. During a LERB, an external (to the formal school) stakeholder identifies an emerging learning requirement, without established T&R events, that highlights the need for a new course (or major additions to an existing course). The external stakeholder will complete and submit a TENS to CG TECOM. Following CG TECOM approval of the

TENS (as part of normal staffing actions, the TENS will be staffed to the respective MSC prior to approval), and subsequent T&R events, the formal school is instructed to execute a pilot to validate the emerging learning requirements. *Note: if the formal school internally identifies an emerging learning requirement, the formal school will route a pilot request to the POI approval authority. MOS-producing courses require OccFld endorsement and are limited in scope to existing courses. The POI approval authority will validate and submit a TENS on the formal school's behalf.*

b. <u>Instructional Innovations</u>. During a LERB, a formal school identifies an opportunity to innovate the design, development, or delivery of an existing POI. POI innovation is likely to result in significant course modification with lasting resource implications, therefore, a formal school submits a request to pilot based on existing learning requirements. Upon approval from the POI approval authority, the formal school executes a pilot to validate innovative approaches to existing learning requirements.

3. <u>Pilot Request</u>. In standard naval format, a CO cover letter with applicable enclosures, as appropriate, serves as the request to pilot. Formal schools will route the request via procedures outlined in academic SOPs to the POI approval authority. Requests to pilot will include the following.

a. <u>Background</u>. Explain the actions to date (e.g., LERB, evaluation data, etc.) resulting in the identification of the need to pilot.

b. <u>Purpose</u>. Explain the purpose of the pilot to include clear identification of the challenge being addressed.

c. <u>Proposed Action</u>. Provide a clear description of the intended pilot. The proposal should include a POA&M detailing developmental time, anticipated duration, number of iterations, and date for reporting piloting results. The number of pilots will be approved by the POI approval authority. Pilots generally do not exceed two iterations to quickly learn and formalize the innovation into a submitted POI or to otherwise reset or cancel the initiative.

d. <u>End state</u>. Provide a clear description of the expected outcome of the pilot program, including measures of performance and measures of effectiveness. Pilots will not be approved without clearly defined indicators of success and clearly defined measures of success.

e. <u>Risk Assessment</u>. Provide an assessment of risk. Risk assessment should focus internally (e.g., the risk to local course execution, local resourcing constraints, etc.) and externally (e.g., the risk to MOS production, the risk to FMF/SE, etc.).

f. <u>Resource Requirements</u>. Identify immediate (e.g., executing pilot) and long-term (e.g., anticipated POI resource changes as a result of pilot) resource impacts. *Note: CG TECOM will not provide additional resources to support the execution of formal school-initiated pilots.*

4. <u>Pilot Staffing and Approval</u>. POI approval authorities will approve, modify, or deny pilot requests without substantive impact on standards or resources within 30 days. Piloting requests that substantively impact standards or resources, particularly as they relate to MOS awards, may take longer as they require greater oversight.

a. Pilot staffing, approval, and reporting will follow the same guidance as POIs with substantive policy, standards, or resource deviations outlined in paragraphs 2002.3.c(1) to (4).

b. Award of a MOS to pilot course graduates requires POI approval authority or CG TECOM approval. CG TECOM approves the award of a MOS to pilot courses in the event the pilot course substantively impacts MOS requirements or standards. All other instances are approved by the POI approval authority after normal staffing and concurrence.

5. POI Development. Given an approved or modified pilot request, formal schools will create a complete POI (consisting of sections I through V). The POI will remain in working form pending the execution of the pilot.

6. Pilot Results. Following a pilot, formal schools will route a piloting results summary to the POI approval authority. The summary will include the following.

a. A summary of pilot results that identifies areas of success and lessons learned from the pilot.

b. A proposed way ahead including a detailed description of POI modifications required to implement pilot course findings.

c. A review of all resources required to implement pilot methodologies into a POI revision/approval (including any impact on training days and cost summary for POM purposes).

d. A summary of FMF/SE engagement regarding the pilot results.

7. Implementing Results. Formal schools will modify the working POI used for piloting purposes based on the results from the POI approval authority. The new POI should be submitted within 60 days of receiving a response to the pilot results summary.

CHAPTER 5

INSTRUCTOR AND ACADEMIC FACULTY DEVELOPMENT

5000. INTRODUCTION

1. The professional development of instructors and academic faculty is a shared responsibility. The individual instructor or faculty member, the formal school, and the Marine Corps all have a vested interest in ensuring the development of world-class learning leaders. A learning leader pursues life-long learning and coaches, mentors, and develops subordinates and peers toward the same end. This chapter outlines key considerations in developing learning leaders with the expertise required to facilitate learning experiences that develop individuals with the knowledge, skills, and dispositions the service requires.

2. The training and education of instructors and academic faculty begins with formalized instruction. The Marine Corps is modernizing the Train-the-Trainer (T3S) school into a learning institution that provides formal schools with world-class learning leaders.

3. Reference (a) requires all formal schools to develop learning leaders who are well-qualified and skilled at enhancing learning through active, learner-centered experiences focused on achieving learning outcomes and learning objectives. Formal schools accomplish this through the execution of an IFDP. Commanders will approve and publish an IFDP that develops learning leaders to achieve the unique developmental needs, mission, and requirements of the formal school, within existing resources.

5001. INSTRUCTORS AND ACADEMIC FACULTY

1. The following definitions will support instructor and academic faculty development across formal schools. The identified roles and responsibilities are not intended to dictate how schools define roles nor organize around their mission; however, they are provided to establish common responsibilities and the associated service-level course and IFDP requirements.

2. Instructor. An instructor is any individual assigned an instructor or teaching billet with the primary responsibility of facilitating learning experiences. An instructor may be a uniformed member or civil servant who teaches a designated lesson or course approved by the appropriate general/flag officer. Instructors engage in research, service, community of practice, and professional development in their fields and the art and science of teaching and learning. *Note: this may include guest speakers and/or guest or adjunct instructors. In the event a formal school leverages guest speakers and/or guest or adjunct instructors, the commanding officer will ensure the speaker is supported by a qualified instructor and meets or exceeds the minimum requirements of a Marine Corps instructor.*

3. Academic Faculty. Academic faculty consists of military personnel and civilians who are directly involved in analyzing, designing, developing, implementing, evaluating, revising, and adapting a POI or curricula to enhance its standards, quality, and relevance. Academic faculty fill academic billets, or are designated in writing, with a primary responsibility for the analysis, design, development, implementation, and evaluation of

POI/curricula. This does not include support personnel, primarily responsible for day-to-day operations, but does include the following.

a. <u>Formal School Advisor</u>. The formal school advisor (FSA) is designated in writing by the commander or his designee and is primarily responsible for ensuring personnel have a working knowledge of the academic references, policies, and directives. The FSA should be a special staff officer and shall have direct access to the commander to advise on policy, doctrine, formal school administration, and other pertinent issues within the school. The FSA should be a distinct position filled by a civilian who can provide continuity; however, it can be the collateral duty of any permanent personnel.

b. <u>Academics Officer</u>. The academics officer is designated in writing by the commander or his designee and is primarily responsible for overseeing POI development and maintenance to ensure compliance with applicable directives. The academics officer administers and guides POI development, evaluation, and maintenance following policies and directives. The academic officer may concurrently serve as the FSA.

c. <u>Course Chief</u>. The course chief is designated in writing by the commander or his designee and supervises all course implementation requirements. The course chief should be the most qualified active-duty Marine but may also be a civilian.

d. <u>Curriculum Developer</u>. The commander or his designee designates the curriculum developer in writing to support the analysis, design, development, implementation, and evaluation of POIs or curricula. Each course at a formal school shall have a designated and assigned curriculum developer, either a uniformed member, civil servant, or civilian contractor.

5002. MARINE CORPS CENTER FOR LEARNING AND FACULTY DEVELOPMENT

1. Reference (a) tasks CG TRNGCMD with leading the transformation of T3S into a premier learning organization that develops Marine Corps learning leaders across the learning continuum, with CG TECOM providing the planning, policy, and resource support that enables T3S transformation into the Marine Corps Center for Learning and Faculty Development (MCCLFD). The following guidance is provided to support unity of command throughout the T3S transformation.

2. <u>Learning Continuum</u>. TECOM PSD consolidated Training Military Occupational Specialty and T3S T&Rs into a Training and Education T&R manual reflecting the professional development needs of instructors and academic faculty throughout the Marine Corps in reference (bb).

3. <u>Modernizing Programs of Instruction</u>. CG TRNGCMD serves as POI approval authority and leads the modernization of all MCCLFD POIs consistent with the guidance herein and reference (a). POI modernization will include an invitation to TECOM PSD and conform to the course innovation guidance herein, with a focus on advancing OBL initiatives grounded in rigorous and repeatable standards.

4. <u>TECOM Support</u>. To synchronize this service-level effort, the TECOM FSM supervisor provides input and feedback to MCCLFD innovations by coordinating with TRNGCMD, integrating policy and MCCLFD innovation efforts, and reviewing MCCLFD POIs during POI staffing actions. TECOM G1 serves as the OccFld

sponsor for all formal school instructor MOSs and coordinates with TECOM PSD to provide TIP submission and annual distribution of seat quotas for all MCCLFD courses.

5. <u>Service-Level Courses</u>. MCCLFD is the service-level provider for instructor and academic faculty development and replaces T3S. To date, MCCLFD has completed the following changes to service-level courses: transformed the legacy instructor development course into the Facilitating Learning Experiences (FLEX) course; piloted a Designing Learning Experiences (DLEX) course, intended to replace the legacy curriculum developer course (CDC); and enacted revisions to the Formal School Managers Course (FSMC). Formal school personnel assigned to specific billets must complete designated MCCLFD courses, as identified below.

    a. <u>Formal School Managers</u>. FSAs and academics officers/directors are required to attend the FSMC within 180 days of assignment. Course chiefs are encouraged to complete the FSMC.

    b. <u>Designing Learning Experiences</u>. Academics officers/directors, course chiefs, and curriculum developers will complete the DLEX within 180 days of assignment. Personnel who completed the legacy CDC are encouraged to attend DLEX.

    c. <u>Facilitating Learning Experiences</u>. Anyone assigned to an instructor billet (e.g., instructors, faculty advisors, or teaching faculty), or otherwise responsible for facilitating learning, will complete FLEX (or an approved alternative) within 180 days of assignment. *EXEMPTION: Drill instructors are only required to attend FLEX (or an approved equivalency) prior to going on quota.*

5003. INSTRUCTOR REQUIREMENTS

1. All personnel who facilitate learning (e.g., instructors, faculty advisors, teaching faculty, etc.) must complete a service-approved instructor course and local qualification prior to facilitating a lesson. Formal school commanders at the O5 or O6 level may authorize unqualified instructors (i.e., who have not yet completed FLEX but have completed local qualification) to facilitate learning on a probationary basis, provided they have completed FLEX Phase I (distance) and are scheduled for an upcoming FLEX Phase 2 (residential).

2. <u>Service-Approved Instructor Course</u>. Instructor qualification requires completion of a service-approved instructor course as follows:

    a. An approved sister-service instructor course provided the instructor primarily facilitates OSS CDDs.

    b. Phase I (distance) and Phase II (residential) portions of the FLEX course offered by MCCLFD.

    c. An approved service-level instructor equivalency course.

3. <u>Service-Level Equivalency</u>. CG TECOM approves all service-level instructor equivalency course requests external to the lead MSC (see section 2003) responsible for the FLEX course POI. The lead MSC (TRNGCMD) will report internal approvals to TECOM PSD, which maintains the list of authorized equivalencies. POI approval authorities will not approve

instructor-producing POIs and formal schools will not certify instructors (except where sister-service instructor courses apply) without prior CG TECOM or lead MSC (CG TRNGCMD) equivalency approval. TECOM MSCs and/or formal schools that intend to certify instructors via a non-FLEX course will submit a request for equivalency to CG TECOM. Requests from formal schools require MSC/POI approval authority endorsement. The request shall include the rationale (e.g., capacity shortfall, number of instructors to train, feasibility of support issues, location, or other relevant factors) and expected number of course iterations annually. TECOM PSD will coordinate each request with MCCLFD to determine equities and maintain the list of approved equivalencies. All approved equivalencies must comply with the below requirements. *Note: current instructor-producing courses without formal authorization to operate as an equivalency will come into compliance within 180 days.*

a. All approved equivalencies must be executed within existing resources. The approval of an equivalency request is not the approval of resources nor an approval of the resulting POI. POI approval remains with the appropriate authority.

b. TECOM MSCs and the formal schools will maintain a copy of the CG TECOM approval letter authorizing equivalency. MSC/POI approval authorities will notify CG TECOM in the event an equivalent POI is disapproved, or implementation otherwise ceases temporarily or permanently.

c. The equivalency POI will include all FLEX ITEs (this does not preclude inclusion of other ITEs). Approved POIs will minimally include all "common" training and education (T&E) T&R events and utilize MCCLFD-provided MLFs. Formal schools operating equivalencies will participate in joint LAs and CRBs with MCCLFD.

d. MSC/POI approval authorities will ensure the first iteration of an approved equivalency is led by a FLEX graduate.

4. <u>Local Qualification</u>. Formal schools will ensure new instructors undergo a qualification process prior to independently facilitating lessons. Qualification procedures may vary between formal schools, but formal schools must consider safety requirements and should consider the following best practices. Formal schools will create local qualification forms accounting for all service-level and local qualification requirements. The completed forms, signed by the commanding officer or his designee, will be maintained in faculty records.

a. <u>High-Risk Training</u>. Formal schools will follow all requirements and maintain all records required for the selection, screening, qualification, and designation of RM instructors, HRT safety officers, and HRT instructors per references (s) and (t).

b. <u>Protecting Against Inappropriate Relationships</u>. All formal schools will maintain initial and annual recertifications for DD form 2982 for instructors and DD form 2983 for trainees. Additionally, all trainees shall receive an inappropriate relations brief according to references (cc) and (dd).

c. <u>Observation</u>. Before assigning an unqualified instructor to a lesson, particularly where methodologies focus on a small group, allow a new

instructor time to observe a lesson taught by a more experienced instructor. This helps with orientation and promotes peer mentoring.

   d. <u>Refreshing Technical Certifications</u>. In lessons involving weapons, equipment, platforms, and the like, confirm and refresh all instructors' technical certifications before assigning them to a lesson.

   e. <u>Attempting a Lesson</u>. Attempting a lesson with a more experienced instructor provides oversight as well as coaching and mentoring opportunities. Precede the scheduled lesson with preparatory briefs, planning discussions, or rehearsals and conduct an after-lesson assessment with feedback.

   f. <u>Supervisory Assessment</u>. Regular and unscheduled facilitation assessments, focused on feedback from supervisors or more experienced instructors, fuel faculty development and aid new and developing instructors in generating personal development plans.

   g. <u>Visible Qualifications Tracking</u>. Visible tracking of supervisory assessments, technical certifications, lesson qualifications, and debrief sessions may integrate competition and extrinsic motivation. Visible tracking also provides commanders and leaders at all levels with a 'one-stop-shop' for viewing faculty readiness and developmental needs.

5004. INSTRUCTOR AND FACULTY DEVELOPMENT PROGRAM

1. All formal schools will develop and enact an IFDP to continue the development of instructors and faculty as indispensable contributors to learning effectiveness. Evidence of an IFDP includes: an approved IFDP, continuing professional development, instructor and faculty records, EMOS tracking, semiannual instructor assessment, and recognition procedures.

2. <u>Review and Approval</u>. Formal school commanders will review and update existing IFDPs upon assuming command. Academic SOPs will reflect the human capital development initiatives of the current commander. The program will be designed and tailored to the strengths and weaknesses of the individual school/command but will minimally account for instructor requirements (*section 5003*) and the following.

3. <u>Continuing Professional Development</u>. Formalized training and education provide the skills necessary for instructors and faculty to fulfill a position. The IFDP will outline the plan for ongoing instructor and faculty development with a focus on a formal school's ability to: sustain requirements, improve POI/curricular practices, enhance learning effectiveness and the employment of learner-centered methodologies, and find efficiencies that will ultimately drive mission success. The plan shall detail any resources available to instructors and faculty members for their continued development.

4. <u>Instructor and Faculty Records</u>. Formal schools will designate an individual responsible for maintaining instructor and academic faculty records (e.g., civilian and military, all learning facilitators, curriculum developers, academic officers/directors, and other staff in support of formal instruction). Records will begin with an individual's assignment and continue throughout their tour. Formal schools may choose to maintain complete records (which will include completion certificates, lesson qualification forms, and semi-annual assessments) in the manner or location

most convenient. Establishing an instructor and faculty development repository and tracking mechanism enables personalized development and helps maintain accountability for professional development. *EXEMPTION: For specific guidance on how MAWTS-1 maintains faculty records, refer to "MAWTS-1 Academic Standards, Processes and Procedures.*

5. EMOS Tracking. Formal schools will track and maintain records for all EMOS awards. FLEX completion is required for novice-level, instructor EMOSs; equivalencies and other service instructor courses pertain (MOS: 0951-0956 and 0981-0986). Additional EMOS requirements are listed below:

   a. Demonstrated level of proficiency and successful completion of duties while serving in an instructor billet.

   b. Serve in a specified instructor-designated BIC for at least six (6) months.

   c. The EMOS may be approved by a formal school CO or director in the grade of O5 or higher. Users must request access to the EMOS certificate via TECOM G1 future operations at the link provided in Appendix A, *Online Resources*.

   d. Formal schools with EMOS approval authority shall establish local awarding and revocation procedures.

   e. The formal school instructor EMOSs 0951-0956 and 0981-0986 may be awarded retroactively to 01 January 2020. Marines will submit a standard naval letter or NAVMC 10274 administrative action form via the first O5 level commander to the current commander or director of the formal school where the Marine served as an instructor. Provide the dates served, billet, copy of fitness reports covering the full period serving as an instructor, and any other amplifying information to assist the commander. The formal school commander will prepare and sign the certificate which will serve as the source document for approving the EMOS.

   f. There may arise unique cases when a Marine may qualify for the EMOS 0951-56 or 0981-0986 but does not clearly meet the requirements outlined above. In these instances, the Marine should contact the appropriate higher headquarters G1 section for guidance.

   g. Depending on the Marine's chain of command, CG TECOM, CG TRNGCMD, or CG Marine Air-Ground Task Force-Training Command will adjudicate all waivers for instances not covered herein.

6. Semi-Annual Assessment. All instructors will undergo semi-annual assessment using the master instructor development (MInD) rubrics, based on the below key performance areas, until the rubric is updated. MCCLFD will update the instructor assessment tools based on the skills and performance standards outlined in the forthcoming T&E T&R.

   a. Self-Improvement. This performance area is about the instructor's drive and ability to solicit and apply feedback, research, and develop skill in using instructional techniques, and broaden his or her domain knowledge in service of providing better and more thorough instruction.

b. <u>Subject Matter Expertise</u>. This performance area is about the instructor acquiring the domain knowledge required to be seen as credible, teach the course, and answer students' questions.

c. <u>Community of Practice</u>. This performance area is about the instructor's contributions to the broad community of Marine Corps instructors and the training and education system. To make such contributions, instructors must first understand how the training and education system operates. Therefore, performance in this area is typically sparse until higher levels of development, when individuals understand the system and its processes and are in a position to suggest improvements.

d. <u>Planning and Preparation</u>. This performance area is about the process and activities an instructor conducts to prepare to give a period of instruction. It entails knowing how learning occurs and selecting the most effective means to facilitate learning depending on the course content and audience characteristics.

e. <u>Instructional Technique</u>. This performance area is about the instructor's knowledge, application, and adjustment of teaching methods and instructional techniques to promote learning across students of different ranks, varied experiences, and different learning styles. Instructors use facilitation and questioning skills, videos and other media or props, and a variety of classroom activities in a blended manner to maintain student attention and engagement, promote conceptual understanding and ability to apply new knowledge.

f. <u>Communication and Delivery</u>. This performance area is about the instructor's presence in the classroom and ability to deliver high-quality instruction with confidence, enthusiasm, and credibility. Instructors use mannerisms, eye contact, and movement around the classroom in addition to clear and articulate verbal communication skills to deliver an effective period of instruction.

g. <u>Setting the Example</u>. This performance area is about the instructor's position among students and peers as a Marine, role model, and passionate advocate for lifelong learning and professional development. Instructors are not only responsible for imparting knowledge and facilitating learning and skills development, but also building Marine professionals who embody Marine Corps values and ethos.

h. <u>Developing Subordinates and Peers</u>. This performance area is about the instructor's ability to form relationships with, coach, and mentor both students and other instructors. To be effective, instructors must be seen as approachable and credible, they must have a genuine desire to help others grow. They must have the knowledge and skills to assess performance gaps and recommend appropriate activities to fill those gaps.

i. <u>Learning Environment</u>. This performance area is about the instructor's ability to establish and maintain the conditions and environment for learning. Instructors do this by encouraging preparation and collaboration, establishing a respectful space that values everyone's inputs, managing time and the pace of instruction, and exerting control to ensure students act professionally and respectfully.

j. <u>Assessing Effectiveness</u>. This performance area is about the instructor gauging whether students are learning the course content as

intended and providing performance feedback in support of learning. Skilled instructors assess learning by reading the audience, continually checking for understanding with questions and interactions, and conducting formal and informal evaluations.

7. <u>Recognition</u>. Each IFDP will detail local procedures for recognizing the outstanding efforts of instructors and academic faculty. It is up to the formal school to decide recognition criteria and procedures, but consideration should be given to professional development accomplishments, performance in job duties, and commitment to the mission of the school and the success of its learners. Procedures should account for opportunities to elevate recognition to TECOM MSC and CG TECOM level recognition.

APPENDIX A

ONLINE RESOURCES

1. Purpose. To provide online resources for formal school academic faculty and support staff.

2. MCU Academic Regulations. Marine Corps University academic regulations are available on the MCU website at: https://www.usmcu.edu/About/Accreditation/ Click on the "Academic Regulations" tab.

3. PME Continuum. Officer and enlisted PME continuums are maintained by MCU and available at: https://www.usmcu.edu/Academic-Programs/Professional-Military-Education-Continuum/ Click on the "Information" tab to find "Continuum Charts."

4. Joint Risk Assessment Tool. Formal schools will use the joint risk assessment tool (JRAT) to complete risk management for each lesson. The joint risk assessment tool is available at: https://jrat.safety.army.mil/login.aspx

5. Instructor EMOS. Users must request access to the EMOS certificate via TECOM G1 FOPS at: https://usmc.sharepoint-mil.us/:b:/r/sites/TECOM_G1_FOPS/Shared%20Documents/EMOS%200951-0956%20and%200981-0988%20v1.0%2020220317.pdf?csf=1&web=1&e=9SROkE.

6. Marine Corps Center for Lessons Learned. MCCLL reports, unit after action reports, and other lessons learned information can be accessed on the following MCCLL sites: https://usmc.sharepoint-mil.us/sites/tecom_mccll (Marine Corps Enterprise Network - MCEN); https://eis-op.usmc.smil.mil/sites/mccll (Secret Internet Protocol Router Network - SIPRNET). MCCLL can be contacted via email at MCCLL_Ops@usmc.mil (MCEN) or MCCLL_Ops@usmc.smil.mil (SIPRNET) should assistance be needed in use of the websites, for requests for information, and to coordinate/submit lessons learned or assessment related products for archiving.

7. Inspection Checklist. Formal schools will be inspected by the TECOM CGIP using the inspection checklist available through the IGMC Marine Corps web site at: https://www.igmc.marines.mil/Divisions/Inspections-Division/Functional-Area-Checklists-FACs/

APPENDIX B

MARINE CORPS TRAINING INFORMATION MANAGEMENT SYSTEM (MCTIMS) GUIDANCE

1. <u>Introduction</u>. MCTIMS is the Marine Corps enterprise integrated, automated, web-based, multi-user system that supports individual and unit training. As the Marine Corps authoritative database for the execution of the SATE and POI processes, formal schools shall use MCTIMS functionality in the performance of schoolhouse functions. MCTIMS facilitates curriculum management, provides student performance evaluation capabilities, and tracks MOS production, quotas, courses, formal school student registration, and permanent personnel.

2. <u>Special Guidance</u>

    a. <u>Class Schedules</u>. Class schedules for POIs conducted at Marine Corps formal schools will be submitted via the MCTIMS student registrar scheduling module according to the annually published TIP. Schedules for POIs at sister service formal schools, but not managed in the sister service's training management system (i.e., schedules that will not reside in Army Training Requirements and Resources System (ATRRS), Corporate enterprise Training Activity Resource Systems (CeTARS), or Oracle Training Administration (OTA)) will be submitted per reference (r). Class schedules are based on the student input requirements published in the approved TIP and they must agree in class frequency and class capacity with the approved POI. Refer to reference (r) for additional guidance regarding class schedule submission and approval. All course schedules should have a report date one day prior to the convene date, except for courses governed by interservice training agreements. Courses falling outside of the one-day report/convene day window must address the gap in CO cover letters submitted with POIs.

    b. <u>Class Verification</u>. Verify class convening rosters within the MCTIMS formal school personnel management module within five (5) calendar days of the class convene date.

    c. <u>Class Validation</u>. Submit validated student and class data (i.e., assign course completion codes, validate classes) using the MCTIMS student registrar within seven (7) calendar days of the class graduation date. When course completion codes have been assigned and the class is validated in the student registrar module, MCTIMS will automatically send course completion data for every registered student to Marine Corps Total Force System (MCTFS), and MCTFS assigns the graduate the appropriate MOS where applicable.

    d. <u>Other Service Course Numbers (OSCN)</u>. For courses with OSCNs, 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, or 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.

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 (SSN), or biometric data. MCTIMS is an enterprise system with built in security measures that protects PII information contained in the system. All MCTIMS users should ensure that adequate safeguards are implemented and enforced to prevent misuse, unauthorized disclosure, alteration, or destruction of PII in

accordance with reference (ee). All MCTIMS users are directed to adhere to the following:

a. All PII related information will be safeguarded.

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. MCTIMS users are not authorized to maintain duplicate MCTIMS data on a personal computer or other non-government furnished device or to share MCTIMS data.

e. Any PII data on local computers must be deleted after being uploaded into MCTIMS.

f. MCTIMS users who print reports with PII are responsible for properly safeguarding the information.

4. Electronic Data Interchange Personal Identifiers (EDIPI). Reference (ff) requires the removal and/or reduced use of SSNs from MCTIMS and other programs or devices. To the greatest extent possible, SSNs will be replaced with EDIPIs to reduce sensitive data from being compromised. EDIPI are unique numbers that are associated with a common access card. In accordance with reference (gg), MCTIMS now uses EDIPI numbers for individual identification instead of SSNs. However, there are specific instances where SSNs are required to build profiles within MCTIMS. The portion of the system that uses SSNs is partitioned from general access and requires special permissions. Additionally, only privileged users are given access to use the EDIPI lookup tool once they have applied and been approved for additional access. For additional information regarding MCTIMS role-based access control, refer to reference (gg).

APPENDIX C

COURSE DESCRIPTIVE DATA (CDD)

1. <u>Description</u>. The CDD summarizes the course, including instructional resources, class length, and curriculum breakdown. The CDD is a crucial document in TECOM resourcing activities and training and education requirements validation. Accurate reporting of resources and requirements is essential to service level management and is required to compete for resources in the POM process. Failure to provide accurate resourcing data in the CDD jeopardizes future funding.

2. <u>CDD Elements</u>. The CDD consists of 24 elements and a notes section.

    a. <u>Course Title</u>. The course title is the plain language name given to a formal course. This element of a CDD may not match what is listed in MCTIMS in instances where it is a new course, or the school is changing the title of an existing course.

    b. <u>Location</u>. Record the complete address for each location where the course is taught.

    c. <u>Course Identifier (CID)</u>. The CID is a unique, seven-digit alphanumeric code composed of several identifying elements. If the course is new, record 'To be determined.' Refer to reference (r) for information on CID establishment, sustainment, and deactivation.

    d. <u>Other Service Course Number (OSCN)</u>. Use other pertinent service course numbers as provided by other branches of the military. If other service course numbers are not applicable, record 'N/A.'

    e. <u>Military Articles and Service List Numbers (MASL)</u>. The MASL is a unique, seven-digit alphanumeric code used to identify a course intended for foreign military instruction. If this type of instruction is not applicable, record 'N/A.'

    f. <u>Outcome (Purpose)</u>. The PLOs, developed in accordance with the requirements outlined within this guidance, are included in the POI for approval.

    g. <u>Scope</u>. Provide a list of the main subjects covered in the course. The list should be comprehensive to include all topics covered. If used, any SLOs will be listed here.

    h. <u>Length (Peacetime)</u>. Record the total number of course days required for the course during peacetime. The minimum peacetime day is eight hours. The minimum peacetime course week is 40 hours (eight hours a day multiplied by five working days).

    i. <u>Curriculum Breakdown (Peacetime)</u>. Provide a breakdown of the curriculum in academic and administrative hours during peacetime. For detailed organizational and tracking purposes of instructional hours, academic hours should be further broken down into methods. Administrative hours should also be broken down into methods or identifiers.

    j. <u>Length (Mobilization)</u>. Record the total number of course days required for the course during wartime mobilization. The minimum

mobilization course day is 10 hours. The minimum mobilization course week is 60 hours (10 hours a day multiplied by 6 working days). There are no established maximum hours for a course day. If the course will discontinue upon mobilization, enter 'N/A.' If the course length is the same during mobilization as in peacetime, click 'Same as peacetime.'

    k. <u>Curriculum Breakdown (Mobilization)</u>. Provide a breakdown of the curriculum in academic and administrative hours for wartime mobilization. During mobilization, it is likely that academic hours increase, and administrative hours decrease. If the course will discontinue upon mobilization, enter 'N/A.' If the curriculum breakdown is the same during mobilization as in peacetime, click 'same as peacetime.'

    l. <u>Maximum Class Capacity</u>. Record the maximum number of students a course can start in each class based on available resources. Resources include classrooms, messing, billeting, equipment, budget, and personnel available.

    m. <u>Optimum Class Capacity</u>. Record the optimum class size. Of note, ammunition is budgeted for the optimum class size.

    n. <u>Minimum Class Capacity</u>. Record the minimum number of students per class that will make the course cost effective.

    o. <u>Class Frequency</u>. Record the number of classes required to support the highest published TIP for the current year and forecasted out-years.

    p. <u>Target Population/Prerequisites</u>. Identify the TPD and list the prerequisites that personnel must meet to attend the course. For MOS-producing courses, the target population and the prerequisites must duplicate verbatim the prerequisites contained in the MOS manual. At no time will school commanders edit the prerequisites or TPD for the course to make the entry requirements for the course more demanding or restrictive than is communicated in the MOS Manual.

    q. <u>MOS Received</u>. Record the MOS assigned to the student upon successful completion of the course per reference (c). If the course does not result in an MOS assignment, record 'none.'

    r. <u>POI Tier Level</u>. Record the POI Tier level.

    s. <u>Funding</u>. Record the name of the agency that funds course attendance. In those instances where a using agency must also bear cost, an explanatory statement must be contained in this section. Courses are funded from a variety of sources, depending on several factors such as student type, length of course, and career track. Basic guidelines for schools to determine funding:

       (1) Courses over 139 days or 20 weeks at one location are considered a PCS move and are funded by Manpower Management Officer Assignments (MMOA)/Manpower Management Enlisted Assignments (MMEA).

       (2) Courses less than 139 days or 20 weeks may be unit-funded or TECOM-funded.

       (3) Entry-level training students are normally funded by MMOA/MMEA.

(4) Lateral moves may be unit-funded or TECOM-funded.

(5) Reservists are usually funded by the Marine Corps Forces Reserve (MARFORRES). Instances where reservists are not funded by MARFORRES include individuals who serve on individual mobilization augmentee or active duty operational support. However, MARFORRES will fund those same individuals if they are selected on the annual Reserve PME board while they are not in an active status.

t. <u>Reporting Instructions</u>. Designate to whom the student will report when arriving for a course of instruction, to include information on transportation and directions (both during and after working hours).

u. <u>Instructor Staffing</u>. Instructor staffing requirements are based on the academic hours and computed in MCTIMS in the ICW of the POI. It allows the school to reflect the instructor staffing requirements for a course by BIC, grade, billet description, rank, service, or MOS. It also allows identification of whether the position is filled or vacant. The ICW and ICW notes are included as Annex A. Formal schools will use the ICW notes to annotate and justify any requests that deviate from the ICW. For formal schools with ITRO agreements, instructor staffing is computed using the ITRO manpower computation formula.

v. <u>School Overhead Requirements</u>. School overhead requirements reflect the total personnel overhead requirements for the entire school (i.e., personnel detailed to support of that POI full-time but not in an instructor role) by BIC, grade, billet description, rank, service, or MOS. It also allows identification of whether the position is filled or vacant.

w. <u>Training/Education Support Requirements</u>. This field lists resource requirements other than personnel. It allows the school to list all requirements and specifically emphasize the portions that exceed current availability (e.g., facilities, equipment, etc.).

x. <u>Task List</u>. This field will only reflect an itemized list of all current and approved T&R events associated with the POI. JLOs relevant to the scope and target population of the course will be listed in the task list notes. Task list notes are required to identify any downgrades and may include other relevant information (e.g., values-based training requirements, amplifying information, etc.).

y. <u>CDD Notes</u>. The CDD notes identify relevant, critical information.

APPENDIX D

GLOSSARY

Academic Faculty. Consists of military personnel and civilians who are directly involved in the design, development, instruction, assessment, revision, and adaptation of the program of instruction or curricula to ensure its standards, quality, and relevance.

Academic Time. Time devoted to learning objective-based instruction, outcome-based instruction, evaluating performance, or conducting lesson purpose. The minimum amount of peacetime daily academic time is seven hours.

Administrative Hours. Administrative hours refer to the time required in the POI for the smooth functioning of the course. As a related term, administrative time includes administrative hours and nonacademic hours.

Assessment. Assessment (learner) refers to the process of gathering information to monitor progress toward requirements with an emphasis on providing learners with the feedback required to successfully master requirements. Assessment (program) is the systematic collection, review, and use of information to improve learning and development.

Attributes. The Marine Attributes (and as applicable joint leader attributes) establish the framework and focus needed to develop and reinforce how Marines should strive to be throughout the training and education continuum.

Capacity (Course). *Capacity* is a generic term for the maximum seats a formal school can provide annually in a particular course, and is dependent upon resourcing (equipment, instructors, facilities, etc.). It is codified in the approved POI or OSS CDD for courses that have an assigned CID. To determine capacity, multiply maximum class size by the course's annual frequency. This information is available online in Student Registrar module TIP reports. *USMC capacity* is a subset of capacity that refers specifically to the portion of overall course capacity usable by the Marine Corps. For most courses USMC capacity is the same as generic capacity. However, for courses not owned by the Marine Corps, such as ITRO-consolidated, naval aviation enterprise, quota, & DOD-directed courses, the USMC capacity represents the number of quotas programmed for or allocated to the Marine Corps. Other services provide the Marine Corps with quotas based on submitted requirements and on past usage.

Course Audit Trail. A course audit trail is used to track the status of the curriculum taught by the formal schools and as a tool for scheduling, maintaining, and managing POI modifications. It includes material that supports POI changes.

Course Identifier. A course identifier is a seven-character TECOM-approved alphanumeric code for a specific formal course of instruction.

Course Structure. The course structure is a detailed chronological document identifying the implementation plan for a course. The purpose of developing a course structure is to determine how much content is appropriate for a single lesson or a single exam and arrange the lessons and exams in a logical sequence. It provides an outline of how the lessons in the course will flow from start to finish.

Curricula. A course of study required for the completion of a given PME school or program. It is constructed by the appropriate school's faculty, dean, and director and is approved by the appropriate general officer.

Curriculum Review Board. The purpose of a curriculum review board is to develop a POI that fully achieves service-level learning requirements.

Dispositions. Dispositions are the qualities, traits, and characteristics, that enable performance in complex and changing conditions, as defined by the Marine Attributes and (as applicable) joint leader attributes.

Education. Education encompasses events designed to develop, maintain, or improve the proficiency of cognitive skills. Education fosters breadth of view, diverse perspectives, critical and reflective analysis, abstract reasoning, comfort with uncertainty, and innovative thinking.

Evaluation. Evaluation (learner) refers to the procedures used to determine whether the individual meets preset criteria, such as MOS qualification and the mastery of rigorous standards. Evaluation (program) is a measured determination of the ability of a lesson, course, and/or learning experience to achieve desired learning objectives and learning outcomes.

Formal Course. A formal course is assigned and maintains a course identifier. All formal courses must comply with formal school management policy.

Formal School. A formal school is an institute that analyzes, designs, develops, implements, and evaluates a POI or curricula approved by the appropriate general/flag officer to meet specified training and education requirements. A formal school operates one or more formal courses.

Formal School Evaluation Plan. A plan detailing a school's procedures for the systematic collection, analysis, interpretation, and use of assessment data to enact changes ensuring the relevance and effectiveness of course(s).

High Risk Training. All basic or advanced, individual or collective training, which exposes personnel to the potential risks of death or severe injury. *Note: Not all training is high risk, but all training can become high risk depending on a broad range of evolving situational conditions. At all times, the unit commander retains responsibility for establishing controls, risk mitigation, and processes for dynamically reassessing the conduct of any training event to reduce or eliminate high risk factors and ensure the professional conduct of training.*

Instructor. Categorized as individuals assigned to a teaching billet or faculty position who facilitate learning as their primary duty. An instructor may also be any person who facilitates a lesson or course approved by the appropriate general/flag officer.

Learning. Learning is developing knowledge, skills, and attitudes through study, experience, or instruction. Learning includes both training and education.

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

Learning Experience Review Board. The purpose of a learning experience review board is to identify opportunities to enhance POI effectiveness through small changes based upon meaningful assessment and evaluation data.

Learning Objective. A learning objective (LO) is a statement of the behavior and level of performance expected of a learner as the result of a learning experience. LOs are expressed in terms of the behavior, the condition under which it is exhibited, and the standard to which it will be performed or demonstrated. LOs establish the *means of development* by communicating the tasks required during a learning experience, with a focus on building skill proficiency and task readiness in the science and art of the profession.

Learning Outcome. Learning outcomes establish the aims of development by communicating the knowledge, skills, and dispositions expected of a learning experience, with a focus on building the attributes that enable effective performance in complex situations.

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.

Learning Requirements. Learning requirements refer to the joint, interservice, or service-level requirements placed on formal schools via the military occupational specialty program, training and readiness program, professional military education program, or other applicable orders and directives.

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

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

Outcomes-Based Learning. Outcomes-based learning is an approach to planning, managing, and implementing learner-centered training and education that emphasizes the development of an individual based on the knowledge, skills, and dispositions expected in the FMF/SE, resulting in cognitively agile Marines who can make bold and consequential decisions in challenging environments.

Pilot. A pilot is a streamlined means for validating course innovations and/or emerging learning requirements.

Program of Instruction. A POI is a service-level learning management document that describes a formal course in terms of target population description, program learning outcomes, subordinate learning outcomes, learning objectives, course structure (and length), facilitation methods, evaluation methods, capacity, and resourcing requirements.

Record of Changes. A record of changes page is a chronological log of all changes made to a POI. Each entry indicates the change number, date of change, date received, date entered, and the signature of the individual entering the change.

Record of Proceedings. The record of proceedings is the only document that validates a CRB took place. They are inspectable items and will be maintained as supporting documentation for all currently executed course(s).

Risk Assessment. A structured process to identify and assess hazards using the JRAT. 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 risk management process.

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.

Systems Approach to Training and Education. The Marine Corps system of systems used to determine, define, effect, and measure the learning necessary for individual or collective needs. Within the systems approach to training, several subsystems analyze, design, develop, implement, and evaluate training and education plans and programs.

Target Population Description. A target population description provides the general description of an average student and establishes minimum administrative, physical, and academic prerequisites each student must possess prior to attending a course.

Training. Training encompasses events designed to develop, maintain, or improve the proficiency of individuals to perform specified skills.

Training and Education Needs Statement (TENS). The initial statement describing the needed capability and current deficiencies (i.e., people, facilities, policy, funding, equipment, curricula, training materials, etc.) that serves as the entrance vehicle into TECOM's TERMS process for consideration.

Training and Education Requirements Management System (TERMS). TECOM's process to quickly and efficiently receive, validate, and prioritize T&E need/gap requests and then assign the appropriate office of primary responsibility to support T&E course of action development in order to facilitate coordinated, resource-informed solution decisions and execution.