



DEPARTMENT OF THE NAVY
HEADQUARTERS UNITED STATES MARINE CORPS
3000 MARINE CORPS PENTAGON
WASHINGTON, D.C. 20350-3000

MCO 1553.2B
C 469

MARINE CORPS ORDER 1553.2B

From: Commandant of the Marine Corps
To: Distribution List

Subj: MANAGEMENT OF MARINE CORPS FORMAL SCHOOLS, PROFESSIONAL
MILITARY EDUCATION (PME) SCHOOLS AND TRAINING DETACHMENTS

Ref: (a) MCO 1553.1_, Marine Corps Training and Education System
(b) Marine Corps Systems Approach to Training and Education (SATE)
Manual
(c) MCO 1580.7D, Interservice Training
(d) MCO 1553.4B, Professional Military Education (PME)
(e) NAVMC 3500.14, Aviation Training and Readiness Program Manual
(f) MCO P3500.72A, Marine Corps Ground Training and Readiness Program
Manual
(g) MCO 5311C Total, Force Structure Process (TFSP)
(h) MCO P7100.8K, Field Budget Guidance Manual
(i) MCO 3500.27B, Operational Risk Management
(j) MCO 5100.29A, Marine Corps Safety Program
(k) MCO 1550.26, Policies and Procedures Governing Marine Corps
Institute (MCI) Training and Education Products
(l) NAVMC 3500.37, Train the Trainer (T3) Training and Readiness
Manual
(m) TECOMO 5041.1, Commanding General's Inspection Program (CGIP)
(n) SECNAVINST 5211.5E, Department of the Navy (DON) Privacy Program
(o) MARADMIN 047/04 Personnel Security Investigations for Instructors
(p) NAVMC 5100.8, Marine Corps Ground Occupational Safety and Health
(OSH) Program
(q) MCO 3504.2 Operations Event/Incident Report (OPREP-3) Reporting
(r) MCO P5102.1B, Marine Corps Ground Mishap and Safety Investigation
Reporting and Record Keeping Manual
(s) CJCSI 1800.01C, Officer Professional Military Education Policy
(t) CJCSI 1805.01, Enlisted Professional Military Education Policy
(u) MCO 1200.13F, Marine Corps Front-End Analysis (FEA) Program

Encl: (1) Formal Schools Management Procedural Guidance
(2) M&RA HRT Instructor Pre-Assignment Checklist
(3) Formal Schools Seat Coordinating Instructions
(4) High Risk Training Courses at Formal Schools

1. Situation. Establish management policies and procedures for the establishment and operation of Marine Corps Formal Schools, Professional Military Education (PME) Schools, and Training Detachments. References (a) through (u) apply.

2. Cancellation. MCO 1553.2A.

DISTRIBUTION STATEMENT A: Approved for public release; distribution is unlimited

3. Mission. This order delineates and defines matters related to Marine Corps training and education. Such matters include, but are not limited to, development of collective and individual training events, oversight of unit-level and formal school training management procedures, and proponency for worldwide Marine Corps training and education support resources. Adherence to the policies and procedures in enclosure (1) will increase mission effectiveness throughout the Marine Corps.

4. Execution. Reference (a) details the overarching policy for the Marine Corps Training and Education system. The standards and procedures set forth in references (b) and (c) apply to commanders and all personnel assigned to Marine Corps Formal Schools, PME Schools, and Training Detachments. Formal Schools, PME Schools, and Training Detachments will ensure that all Programs of Instruction (POI) are developed with strict adherence to reference (b) and enclosure (1).

a. Commander's Intent and Concept of Operations

(1) Commander's Intent. Formal School, PME School, and Training Detachment Commanders/Directors/OICs shall administer their school and subordinate courses per this Order to ensure continuity of service level processes and satisfaction of identified training and education requirements. As Training and Education Centers of Excellence (TECOE) strive to integrate training and education across the training continuum, it is imperative that all Formal Schools, PME Schools, and Training Detachments develop standards based training and education in accordance with reference (b).

(2) Concept of Operations

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

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

(c) Commanding officers/Directors/OICs of Formal Schools, PME Schools, and Training Detachments shall follow the policies and procedures in this Order, reference (b), and enclosure (1).

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

b. Tasks

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

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

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

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

(d) Pre-screen all HRT Instructor candidates per enclosures (2) and (3) prior to assignment to Marine Corps Formal Schools or Detachments.

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

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

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

(c) Report any problems concerning training and education to CG, TECOM for resolution.

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

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

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

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

(h) Determine Formal and PME School seat requirements per enclosure (3).

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

(a) Promulgate, develop, coordinate, monitor, and evaluate training and education policy, plans, concepts, and programs for training and education in Formal Schools, PME Schools, and Training Detachments.

(b) Establish Formal Schools, PME Schools, and Training Detachments to satisfy Marine Corps-wide training and education requirements.

(c) Establish the procedures, tasks and responsibilities for Training and Education Centers of Excellence (TECOE).

(d) Direct Formal Schools, PME Schools, and Training Detachments to develop programs of instruction that satisfy the training and education requirements identified in references (c), (d), (e), (f), and appropriate community T&R manuals.

(e) Conduct and review evaluations of training and education performed in the Formal Schools, PME Schools, and Training Detachments and resolve all issues.

(f) Determine priorities and allocate assigned resources to support valid Formal School/PME School/ Training Detachment training and education requirements.

(g) Review and approve POIs for all courses taught at Marine Corps Formal Schools, PME Schools, and Training Detachments. Review all equivalent course documents from other service schools and civilian courses to determine if they meet Marine Corps training and education requirements. (C 469/C 4610)

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

(i) Update as required and post the Marine Corps Formal Schools Catalog on the Marine Corps Training Information Management (MCTIMS) website. (C 4611)

(j) Identify, in conjunction with MOS/OccFld Advocates, and include in the Formal Schools Catalog, all pre- and post-course requirements for Marine attendance and graduation. (C 4611)

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

(l) Assist schools with the use of MCTIMS for the development of the Program of Instruction (POI) for each training and education course of instruction, and for use in managing student and class data. (C 469)

(m) Conduct Curriculum Assistance Visits (CAV) for all Marine Corps Formal Schools, PME Schools, and Training Detachments. (C 469/C 4610)

(n) Provide and maintain the Train the Trainer School (T3S) to support the training and education requirements of Formal School instructors, curriculum developers, school administrators, and Operating Force and Supporting Establishment Unit Training Managers. (C 469)

(o) Consolidate and submit all costing data for Formal School, PME School, and Training Detachment training and education in accordance with reference (h). (C 464)

(p) Coordinate Program Objective Memorandum (POM), Program Reviews and Financial Budget Plan data calls with Formal Schools, PME

Schools, and Training Detachments for identification of funding requirements.
(C 4671)

(q) Coordinate product development priorities for the receipt, evaluation, staffing, and tasking of MCI training development products. (C 468)

(r) Develop distance-learning courseware for MOS and PME training and education based on approved training and readiness events and learning outcomes. (C 468)

(s) Assist schools with the use of MCTIMS Student Registrar module to maintain accountability of students in the training pipeline. (C 4611)

(t) Establish a Commanding General's Inspection Program (CGIP) to assist, inspect, and assess mission readiness of Formal Schools, PME Schools, and Training Detachments.

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

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

(a) Exercise command and operational control of all assigned Marine Corps Formal Schools and Training Detachments.

(b) Manage policies and administrative procedures for the application of the SATE and ORM processes in the formal schools.

(c) Submit for review, validation, resourcing, and approval, all POIs for Formal School and Training Detachment courses to CG, TECOM (C469) every two years.

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

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

(b) Manage policies and administrative procedures for the application of the SATE and ORM processes in the PME schools.

(c) Submit for review, validation, resourcing, and approval, all POIs for PME Schools to CG, TECOM (C469) every two years.

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

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

(b) Maintain memorandum of understanding with the Commander, Naval Safety Center (NAVSAFCEM) so required HRT safety surveys and assist visits to all schools and detachments remain in place. (Note: Safety assist

visits differ from safety surveys in that they render assistance pertaining to a specific safety problem vice a complete safety overview. Assist visits may be requested as required. These visits are at no cost to the requesting unit.)

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

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

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

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

(a) Provide HRT program safety surveys and assist visits to all schools and detachments listed in enclosure (4).

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

(8) Commanding Officers, Marine Corps Formal Schools, PME Schools, and Detachments shall:

(a) Follow the directives found in enclosure (1) and references (a through f), (i), and (j).

5. Administration and Logistics. Submit all recommendations concerning this Order to CG, TECOM via Training, Management and Evaluation, Ground Training Branch (C469TM).

6. Command and Signal

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

b. Signal. This Order effective date signed.

G. J. FLYNN
Deputy Commandant
Combat Development and Integration

DISTRIBUTION: 10201918600
Copy to: 7000110 (55)
7000144/8145001 (1)
7230004 (20)
8145005 (2)

LOCATOR SHEET

Subj: FORMAL SCHOOLS MANAGEMENT PROCEDURAL GUIDE

Location: _____
(Indicate location(s) of copy(ies) of this Order.)

RECORD OF CHANGES

Log completed change action as indicated.

Change Number	Date of Change	Date Entered	Signature of Person Incorporated Change

TABLE OF CONTENTS

<u>IDENTIFICATION</u>	<u>TITLE</u>	<u>PAGE</u>
CHAPTER 1	CURRICULUM DEVELOPMENT.....	1-1
1.	Introduction.....	1-1
2.	Training and Readiness.....	1-1
	Individual Training Events and Joint Learning Objectives (JLOs).....	1-1
	Ground T&R Development Process.....	1-2
	Aviation T&R Development Process.....	1-3
3.	Marine Corps Formal Instruction.....	1-3
	Program of Instruction (POI).....	1-3
	Course Descriptive Data (CDD).....	1-4
4.	POI Documentation.....	1-6
	POI Validation.....	1-6
	POI Staffing.....	1-7
	POI Approval.....	1-8
	POI Changes.....	1-9
	POI Revisions.....	1-9
5.	Proof of Concept CDD (POC CDD).....	1-10
6.	Master Lesson File (MLF).....	1-10
Figure 1-1	POI Staffing Process.....	1-7
CHAPTER 2	ROLES AND RESPONSIBILITIES.....	2-1
1.	Introduction.....	2-1
2.	Training Records.....	2-1
3.	Previous Instructor/Curriculum Administrator Training..	2-1
4.	Train the Trainer (T3) School.....	2-2
5.	Commanding Officer/Director/OIC Responsibilities.....	2-3
6.	Formal School Manager.....	2-7
7.	Academics Officer/Section.....	2-7
8.	Course Chief.....	2-7
9.	Primary Instructor.....	2-8
10.	Assistant Instructor.....	2-9
11.	High Risk Training Instructor.....	2-9
12.	High Risk Training Safety Officer (HRTSO)	2-10
13.	Curriculum Administrator/Developer.....	2-11
CHAPTER 3	EVALUATION.....	3-1
1.	Introduction.....	3-1
2.	Purpose.....	3-1
3.	Commanding Generals Inspection Program (CGIP).....	3-1
4.	Continuous Evaluation.....	3-1
5.	Course Content Review Board (CCRB).....	3-1
	Record of Proceedings (ROP).....	3-2
	Formal CCRBs.....	3-2
	CCRB Chair.....	3-2
	Consolidated CCRBs.....	3-2

CHAPTER 4	FORMAL SCHOOLS RESOURCES AND REQUIREMENTS.....	4-1
1.	Background.....	4-1
2.	Programming.....	4-1
3.	Budget Submissions.....	4-2
4.	Additional Support Requirements.....	4-3
CHAPTER 5	ADMINISTRATION AND OVERSIGHT.....	5-1
1.	Introduction.....	5-1
2.	Management Tools.....	5-1
	Marine Corps Training Information Management System (MCTIMS)	5-1
	System Change Request (SCR).....	5-1
	Production Trouble Report (PTR)	5-1
	Student Registrar.....	5-1
	Student Management.....	5-1
	Curriculum Management Development.....	5-1
	Student Evaluation.....	5-2
	Scheduling Wizard.....	5-2
	Marine Sierra Hotel Aviation Readiness Program (MSHARP)	5-2
3.	Safeguarding Protective Personal Information (PPI).....	5-2
4.	Training Safety.....	5-3
	Operational Risk Management in the Formal Schools, PME Schools, Training Detachments.....	5-3
	ORM Process Training and Education.....	5-4
	High Risk Training.....	5-5
APPENDIX A	COURSE DESCRIPTIVE DATA.....	A-1
APPENDIX B	TECOM DEFICIENCY WORKSHEET.....	B-1
APPENDIX C	POI CHECKLIST.....	C-1
APPENDIX D	SAMPLE COVER LETTER.....	D-1
APPENDIX E	INSTRUCTOR OF MARINES ROADMAP.....	E-1
APPENDIX F	FORMAL SCHOOL INSTRUCTOR COURSE (FSIC) PRE SCREENING CHECKLIST.....	F-1
APPENDIX G	CURRICULUM DEVELOPER COURSE (CDC) PRE-SCREENING CHECKLIST.....	G-1
APPENDIX H	MCTIMS SCR/PTR Template.....	H-1
APPENDIX I	OPERATIONAL RISK ASSESSMENT WORKSHEET (ORAW).....	I-1
APPENDIX J	CEASE TRAINING (CT) PROCEDURES AND REQUIREMENTS.....	J-1
APPENDIX K	FORMAL SCHOOL HRT INSTRUCTOR PROGRAM.....	K-1
APPENDIX L	DEFINITIONS AND PROCEDURES.....	L-1
APPENDIX M	RESOURCE ASSISTANCE GUIDE.....	M-1

Chapter 1

Curriculum Development

1. Background. The Marine Corps Formal Schools shall be administered in accordance with this Order and enclosures. Adherence to the policies and procedures outlined herein will increase mission effectiveness throughout the Marine Corps. As Training and Education Centers of Excellence (TECOE) strive to integrate training and education across the training continuum, it is imperative that all Formal Schools, PME Schools, and Training Detachments develop standards based training and education in accordance with reference (b).

2. Training and Readiness

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

b. These T&R Programs are based on Operating Force training requirements and performance based standards designed to ensure unit proficiency in combat skills. The standards established in these programs are validated by subject matter experts (SMEs) to maximize combat capabilities for a unit assigned Mission Essential Tasks (METs). Both T&R Programs produce fundamental tools used by commanders of Formal Schools, PME Schools, and Training Detachments to construct and maintain effective formal programs of instruction for entry level and skills-progression, and non-MOS PME courses. T&R Manuals also support unit Managed On-the-Job Training (MOJT) and unit readiness by identifying Mission Essential Tasks (METs) and the standards for E- coded events and other collective events.

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

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

(2) Joint Learning Objectives (JLOs) are established in the Joint Instruction for Officer and for Enlisted Professional Military Education Policies (references (s) and (t), respectively). Marine SMEs represent the Marine Corps' interest at Joint formal schools to ensure joint training requirements are met. Gaps in joint training are identified by SMEs and training is developed to meet these gapped training requirements.

(3) Individual Training Events (ITEs) and educational objectives form the foundation from which formal and PME schools develop new or revised programs of instruction (POIs). POIs identify the requirements to conduct a

course, and any additional resources needed such as instructors, ranges, ammunition, facilities, and other logistical support, or the acquisition of new educational systems, equipment and/or devices.

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

e. Ground T&R Development Process

(1) T&R Conference. The T&R Development process begins with a conference at which SMEs from the Operating Forces, OccField Sponsors, and Schoolhouse Personnel gather to determine the individual and collective training events necessary to provide MOS mission capable Marines and Marine units to the Operating Forces. The goal of the T&R Conference as the first phase of the T&R Development process is to identify and validate individual and collective tasks, build conditions, standards, performance steps/component events, identify event support requirements, and enter the information in the T&R Development Module of the Marine Corps Training Information Management System (MCTIMS).

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

(3) Draft T&R Manual. Following the T&R Development Conference, the GTB Task Analyst will build event reports from MCTIMS and collate those reports with other information required in the T&R Manual to create a draft T&R for staffing to the Operating Forces, HQMC, and the schoolhouse. The draft T&R will be posted on the GTB website for staffing and will be staffed through MCATS for comments. GTB will release a DMS message to the Operating Forces and schoolhouse to identify the location of the draft T&R and provide instructions for reviewers to provide comment. The draft T&R will be provided for comment for thirty (30) days from release of the message.

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

f. Aviation T&R Development Process. The aviation T&R development process closely mirrors the ground T&R development process. Specific

information regarding the individual aviation T&R Manuals, conduct of conferences, and staffing processes are governed by reference (e).

g. Marine Corps Formal Instruction

(1) Approved and published ITEs that are designated for instruction at the Formal/PME School, or Training Detachment become the foundation for the development or revision of a course. ITEs are designated as entry-level or post entry-level training. Entry-level ITEs shall be trained at the MOS producing formal school(s). Those ITEs not designated for entry-level instruction may be included in skills-progression or non-MOS PME courses, or in unit Managed On-the-Job Training (MOJT) programs. ITEs can also be instructed using Distance Learning (DL) courses developed by the College of Continuing Education (CCE) and the Marine Corps Institute (MCI).

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

(3) Lesson Purpose. Lesson Purpose is for presenting material that, while important, is not necessarily associated with training standards and is not testable. Instruction hours assigned to Lesson Purpose classes shall constitute no more than one hour a week of formal instruction nor more than 2.5% of total classroom time so the focus of the course is on mastery of associated ITEs. Lesson Purpose should be reserved for presentation of a course overview or overview of a training package, or material provided to enhance the presentation of a TLO or ELO.

3. Program of Instruction. The Program of Instruction (POI) details the structure, content, and execution of the course. During the development phase of the Systems Approach to Training and Education (SATE) process, all Marine Corps Formal Schools, PME Schools, and Training Detachments are required to create POIs using the MCTIMS Curriculum Management and Development Module (CMD) and to submit POIs per this order and reference (b).

a. Title Page. The title page provides information necessary to identify the document. This includes the course title, Standard Subject Identification Code (SSIC), school name/address, and effective date. The effective date is left blank until the POI is approved, then the date approved is recorded. Each time a revised POI is approved, the new approval date is recorded.

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

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

d. Table of Contents. This table details the content of the POI and is arranged by section number and section title. The table of contents should include by section the following: CDD, Summary of Hours, Scope of Annexes, Concept Cards, Student Performance Data, and Distribution List.

e. Course Descriptive Data (CDD). The Course Descriptive Data (CDD) within the Program of Instruction (POI) is the key document for all TECOM activities involved in the resourcing process. The CDD is part of the POI and is the school's estimate of the resource requirements for the course.

(1) All Formal Schools, PME Schools, and Training Detachments will review all CDD portions of active POIs annually in connection with the TECOM, G-7 and G-8 annual budgeting and programming data calls.

(2) The CDD contains 24 essential elements providing the justification for development or refinement of formal training or professional military education courses. The 24 elements provide a summary of the course, including the instructional resources, course length, a breakdown of curriculum hours, and the task list indicated in the appropriate Training and Readiness (T&R) Manual(s) (see Appendix A). JLOs should also be specified on the CDD task list. Specifically, the CDD does the following:

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

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

(3) Resource requirements are contained in CDD items 21, 22, 23 and/or the "CDD NOTES" after item 24. Manpower resource requirements are identified in items 21 and 22. All other resources are listed in item 23. The MCTIMS data fields for items 21 and 22 contain preformatted Table of Organization (T/O) information and space for free text remarks. Item 23 is entirely free text. Each of the three items will contain the following:

(a) Item 21 allows the school to reflect the total instructor requirement for a course by T/O number, line number, grade, and billet. Item 22 is much the same as item 21 except that it reflects the total personnel overhead requirement for a course.

(b) For item 21 and 22, it is imperative that the school indicate the actual deficiency (course requirement minus authorized T/O strength) in separate remarks so that there will be no confusion as to what additional personnel (if any) are required to implement the course.

(c) Item 23 will be used to list resource requirements other than personnel. It will list all requirements, but specifically emphasize the portion that exceeds current availability, e.g., a course that requires a total of 9 xyz widgets, for instance, of which 6 are already on-hand, will highlight the 3 xyz widget deficiency in item 23. Item 23 will contain, at least, the following:

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

5. Justification.

f. Summary of Hours. Section II of the POI consists of a summary of the course. Included are two items: a breakdown of the academic and administrative hours, and revision data.

(1) All academic hours are organized by using annexes. Annexes can duplicate the functional areas ITEs/T&Rs are organized by, or they may be some other organizational grouping determined by the developer of the POI. Annexes A-Y are for academic concept cards and annex Z is reserved for administrative concept cards. Due to MCTIMS' automatic calculations of academic and administrative hours from each concept card, the totals shown in this paragraph will match the instructional hours represented on the concept cards and the curriculum breakdown in the CDD (items #9 and #11).

(2) Revision data is listed by lesson designator, lesson title, and lesson time expressed in hours. The previous and current lesson designators and hours are listed (when applicable) and rationale is provided for each change to these items.

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

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

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

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

a. POI Validation. The resource manager at the formal school shall review and validate POI information prior to submission. Commanders shall verify the POI information is valid and accurate prior to staffing via the chain of command to TECOM for approval.

(1) Commanders shall certify the validity and accuracy of the POI by signing a cover letter from the CO to CG, TECOM dated the same day the POI is submitted to TECOM electronically in MCTIMS. Should substantive changes be made to the POI following the initial submission, a new cover letter should be signed and dated to assure CG TECOM that the commander is aware of the

most current version submitted for his approval. In standard Naval letter format on formal school letterhead, the commander will address in narrative: any shortfall(s) highlighted in CDD Items 21, 22 or 23; justify any additional time requested to execute training; and identify, with justification, any training events added, deleted, or downgraded from the currently approved curriculum.

(2) As direct communication with the CG of TECOM, the Commander should ensure all issues of importance to the CG are addressed. The cover letter also certifies that the Commander is aware of and approves the contents of the POI. The cover letter may be sent electronically in ".pdf" format to the appropriate TECOM task analyst and contents of the cover letter will be reproduced on the routing sheet when the POI is sent for staffing.

b. If the POI being submitted cannot be executed with existing resources, the forwarding letter will identify those shortfalls most critical to the execution of the course. Normally, additional resources need to be programmed through TECOM G-8, which is done three years in advance. Unless the resources required were identified as a deficiency on the previous year's financial plan data call (submitted during the fiscal year's third quarter), and relief subsequently granted, it must be reported to TECOM, Comptroller as an unfunded priority deficiency as indicated below in the section on Funding Deficiencies using the Training and Education Command Funding Deficiency Format (Appendix B).

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

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

e. The POI checklist contained in Appendix C will be signed by the Course Chief, Formal School Manager, and Commanding Officer/OIC/Director and submitted concurrently with the POI and the cover letter.

f. POI Staffing. When a POI is received by HQ TECOM, the GTB/ATB responsible Task Analyst will review the POI to ensure compliance with reference (a) and other applicable Orders/directives. The Task Analyst will contact the formal school or training center to resolve any identified discrepancies; all discrepancies must be resolved before the POI can be staffed for approval. When possible, staffing will be accomplished electronically to previously coordinated points of contact in resource management sections/branches.

(1) The TECOM staffing process will not exceed 60 days.

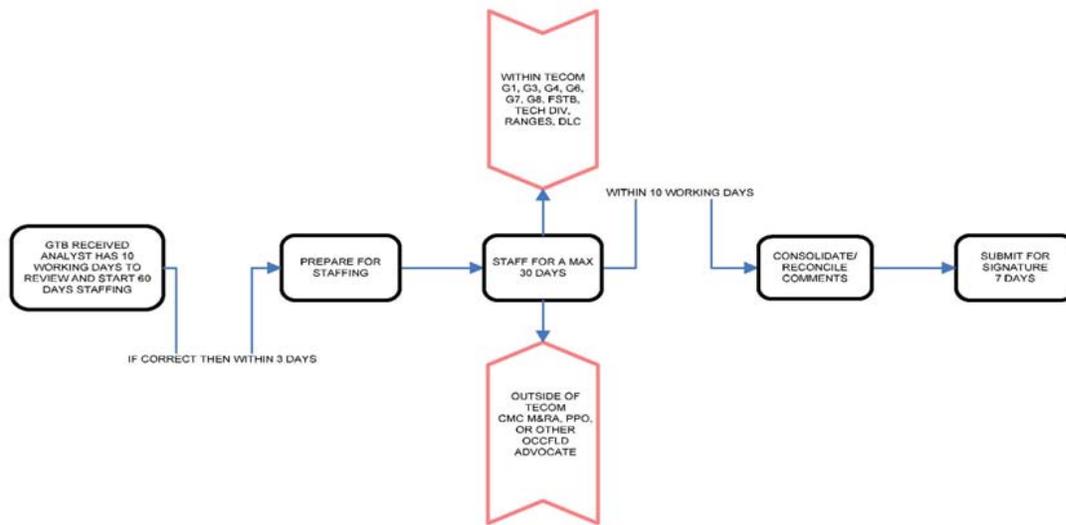


Figure 1-1: POI Staffing Process

(2) The ATB/GTB task analyst or PME analyst for the course staffs the POI and continues staff action to refine and resolve resourcing issues. The POI will be staffed to the following offices for review, comment, and recommendations:

- (a) Applicable Occupational Field Advocate.
- (b) HQMC, Manpower and Reserve Affairs.
- (c) TECOM G-1 (Analysis of personnel requirements)
- (d) TECOM G-3 (Current Ops/Future Ops)
- (e) TECOM G-4 (Analysis of equipment; ammunition requirements)
- (f) TECOM G-6 (Analysis of computer/It related requirements)
- (g) TECOM Comptroller (Analysis of funding requirements)
- (h) TECOM G-8 (Analysis of programming implications (funding; MILCON; equipment))
- (i) Information Technology Branch
- (j) Range and Training Area Management Branch
- (k) College of Continuing Education (CCE)/Distance Learning Center (DLC)
- (l) Formal Schools Training Branch

(m) Safety

(n) Interservice Training Schools Branch

(3) Staff Resource Proponents (manpower, facilities, ammo, ranges, and supply/equipment) will identify resource shortfalls in their commodity area. Where issues may be resolved internally, proponents will make recommendations such as: adjust MCBUL 8011 to increase ammunition allocations, reassign personnel, adjust budgets to provide additional funding, etc. Proponents will clearly state any necessary follow-on actions required and who is responsible for initiating the action. When internal resolution is not possible, proponents will detail actions to be taken, and provide an estimated time-line for when resources can be put in place. Proponents are directed to seek non-traditional solutions to address resource shortfalls until programming can be effected.

(4) When staffing comments are returned, the task analyst resolves any further discrepancies or determines whether further coordination is required. A recommendation to approve or disapprove the POI is then submitted to CG, TECOM.

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

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

(a) "Approved". This constitutes unconditional approval of the POI. From a resource standpoint, it is understood that the school possesses sufficient resources to commence instruction. The letter may contain other guidance on distribution and prioritization for existing course resources in order to implement the approved POI, but the basic tenet—unconditional approval—remains.

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

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

(2) The importance of the POI decision letter cannot be overemphasized. The approval letter, **NOT THE POI ITSELF**, is the document which obligates TECOM activities to provide resources, or to take certain actions that will ultimately result in resources being provided as feasible. The format of the POI letter will be as depicted in Appendix D.

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

h. POI Changes. POIs are dynamic documents. If changes are immediately required following approval of the POI (i.e., modification of the task list, or changes due to resource requirements are necessary), those changes will be identified to CG, TECOM via GTB/ATB task analyst listing the necessary change, justification for change, and the impact on execution of the POI. POIs requiring this kind of change will be modified following the next CCRB/T&R Manual revision. Commanders/OICs/Directors may not "locally approve" changes to the POI when those changes involve task list/T&R modification or changes in required resources. Time-critical changes to T&R Manuals, reflected in the working copy of the T&R Manual and approved by appropriate advocate, Task Analyst, and/or T&R sponsor, may be immediately integrated into formal school instruction, but must be formalized by submitting an updated POI for approval.

i. POI Revisions. Major Subordinate Commanders (MSCs) will ensure Formal/PME Schools and Training Detachments submit POIs for review every two years from the date of initial approval, or sooner as the need requires, or as directed by CG, TECOM. POI submission will follow the T&R Manual revision cycle to the maximum extent possible. The Formal/PME School or Training Detachment, in concert with the assigned task analyst, will formulate a two year, long-range plan that outlines a schedule for CCRBs, POI submission and MLF completion. Revised POIs will be submitted within 120 days of T&R Manual approval. CCRBs will be held within the 120 day window prior to the first planned T&R Manual revision conference. Requests for deviation will be fully justified in a waiver request to CG, TECOM (C469/C4610).

5. Proof of Concept CDD. At times, due to an Operating Force Universal Need Statement (UNS), advocate direction, or Course Curriculum Review Board (CCRB) recommendations, Formal/PME Schools will be tasked to develop new instruction to meet an existing training gap or a critical emerging training/education requirement. In order to expedite the development of new instruction, a *Proof of Concept CDD* will be submitted containing the following information: course title, purpose, scope, length, location, class capacity, class frequency, task list, and training/education support requirements. The Proof of Concept CDD will identify critical resource shortfalls and detail interim plans for execution of this training until all resource requirements can be addressed.

a. The Proof of Concept CDD will be submitted under cover letter identifying why the course is required, what deficiencies it will correct, and why it will be conducted in a formal school setting. Pertinent documentation such as the UNS, advocate written direction, pertinent Marine Corps Center for Lessons Learned (MCCLL) information, or the CCRB Record of

Proceedings will be included as an enclosure. The cover letter will also include an assessment of the school's ability to execute the instruction utilizing existing resources (instructors, structure, facilities, equipment, funding).

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

c. The Proof of Concept CDDs cover letter will include an assessment of the schools ability to execute the instruction utilizing existing resources (instructors, structure, facilities, equipment, funding). The Proof of Concept CDD will identify critical resource shortfalls and detail interim plans for execution of this training until all resource requirements can be addressed.

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

e. POIs for Proof of Concept CDDs will be submitted to CG TECOM, ATB/GTB on the following schedule:

(1) For directed courses: 120 days following approval of the Proof of Concept CDD.

(2) For CCRB recommended courses: 120 days following CG, TECOM approval of the Proof of Concept CDD.

6. Master Lesson File

a. Course information contained in the Master Lesson File (MLF) and the training schedule must match the approved POI. MLFs will contain, at a minimum, the requirements listed in reference (b). The training schedule will contain, at a minimum, the lesson designators, titles, and the times. The normal peacetime training week will average 40 hours (8-hours per day times 5 work days) of which at least 35 hours should be academic time. Physical Training (PT) is considered academic time due to the requirement for an instructor. The training schedule will follow the course structure to the maximum extent possible.

b. Master Lesson Files (MLFs) will contain at a minimum, the following material:

(1) Learning Analysis Worksheets (LAWs). Documents the transition between the T&R events and learning objectives/outcomes.

(2) Learning Objective Worksheets (LOWs). Describes the anticipated learning outcome, provides a measurement for each Learning Objective/Outcome (LO), and contains the selection of methods and media for that specific LO.

(3) Concept Cards. Identifies all of the learning objectives, instructional methods and media, and the resources required to conduct the entire lesson, exam, or event.

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

(5) Student Outline

(6) Supplemental Student Materials (if applicable)

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

(8) Instructor Preparation Guide (IPG)

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

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

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

DRAFT

Chapter 2

Roles and Responsibilities

1. Introduction. Marine Corps Formal Schools, PME schools, and Training Detachments will establish a policy for faculty development. In addition to formal requirements specified in this chapter, schools will tailor additional faculty development to the needs of their school. Specifically, faculty development programs will center on maintaining proficiency in the formal school faculty ITEs listed in reference (1). The faculty development program will also include refresher and or advanced training/education in course content; and advanced or emerging topics in curriculum, instruction, evaluation, adult learning and school administration.

2. Training Records. All schools and detachments must maintain training records for each faculty member (civilian and military) documenting completion of required training. Training records will contain at a minimum:

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

(b) T3S Course completion certificates.

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

(d) Quarterly Instructor Evaluations (Instructors will be evaluated by a FSIC graduate using the Instructor Evaluation Checklist, SATE Manual, Appendix E.)

(e) All Instructional Rating Forms (IRFs). IRFs will be completed by at least 10% of all students immediately following each lesson (SATE Manual, Appendix D).

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

(g) Instructor platform hours.

3. Previous Instructor/Curriculum Administrator Training

a. Primary instructors who have previously completed another service's instructor training course are not required to attend the FSIC. FSIC graduates, and graduates from other service instructor training courses, will maintain their qualification for a period of three years. Instructors reassigned to a formal school will be required to attend FSIC again for recertification. Marine instructors at Inter-service Training Review Organization (ITRO) schools may attend another service's local instructor course; however, every attempt will be made to send Marine instructors to the FSIC.

b. Regardless of previous training or education, all Operations Officers, Operations Chiefs, Course Chiefs, FSMs, civilian employees, TECOM Task Analysts, curriculum administrators/developers will attend the CDC.

4. Train The Trainer (T3) School. The Train The Trainer School (T3S), located in Camp Johnson, NC and Camp Pendleton, CA (Detachments East and West, respectively), provides resident, Mobile Training Team (MTT), and Distance Learning courses for specific billets within Marine Corps Formal Schools, PME Schools, and Training Detachments.

a. Formal and PME School Commanding Officers/Directors and Training Detachment OICs will:

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

(2) Use Appendix F or G to screen personnel to ensure that all prerequisites have been met prior to attending the required T3S course.

(3) Complete the DL Formal School Commander Course available on the TECOM website at

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

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

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

c. All Marine Corps Formal School, PME School, and Training Detachment personnel will complete the SAT (MarineNet course # UT01A0), and ORM (MarineNet course # DI5101A) DL courses within 30 days of reporting.

d. Formal Schools, PME Schools, and Training Detachments will contact the appropriate T3S Detachment to secure a seat in the required course and to initiate a funding request for Marines attending the course via TAD.

(1) If attending the course on TAD orders, personnel assigned to Formal Schools, PME Schools, or Training Detachments located east of the Mississippi River, will attend T3S Detachment East located at Camp Johnson, North Carolina.

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

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

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

5. Commanding Officers/Directors/OICs of Formal Schools/PME Schools/Training Detachments Responsibilities

a. Staff and Faculty Development

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

(a) Required formal training

1. Assign all primary instructors and curriculum administrators to the appropriate T3S course early in their assignment; within 120 days of their arrival at the school/detachment. Submit the appropriate screening checklist (Appendix F or G) with nomination request for faculty attending T3S courses.

2. Require all personnel to complete the required SAT and ORM Indoctrination DL courses.

(b) New instructor orientation

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

2. Mentoring program

3. Introductory period during which new instructors observe classes.

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

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

6. Requirement for staff review of new instructor's teaching, providing both rigorous peer evaluation and informal certification to instruct a course (typical of the "murder boards").

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

(c) Continuing Professional Development

1. Sustainment interval/refresher training in the formal school faculty ITEs listed in reference (1).
2. Refresher and or advanced training/education in course content.
3. Advanced or emerging topics in curriculum, instruction, evaluation, adult learning and school administration.
4. Establish a standardized reading list tailored to the needs of each individual school (a list of resources utilized in higher education can be found on the T3S website at:

<https://www.intranet.tecom.usmc.mil/schools/T3S/default.aspx>

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

b. POI Submission. Submit POIs to CG, TECOM for review of all new or revised formal courses of instruction. This POI must be received within 120 days of submission (from ATB/GTB to CG TECOM) of a new or revised T&R Manual. For courses taught at multiple locations, the mirrored schools will submit the POIs simultaneously within 120 days. For those courses of instruction conducted at other service schools, submit equivalent course documentation. Requests for extensions will be submitted to and approved by CG, TECOM (C 469/C 4610). Formal course revision is only authorized when an updated POI, along with a cover letter detailing the proposed changes, is approved by CG, TECOM. Course revision can also be authorized via a formal approval letter from CG, TECOM.

c. Master Lesson Files. Maintain an MLF for each lesson taught containing the required components and checklists in accordance with the SATE Manual, reference (b).

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

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

d. Archives. Maintain an archive of the following course documents: POI to include approval letter, pertinent T&R Manuals, Course Content Review Board Record Of Proceedings, and After Instruction Reports.

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

f. Student Management

(1) Ensure students meet the prerequisites for attendance of their school as codified in the Target Population Description (TPD) in MCTIMS.

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

g. Lateral Coordination

(1) When designated as a lead school for any jointly attended courses, coordinate with the appropriate commander(s) of the other service school(s) for a joint submission of POIs, and T/O&Es to CG, TECOM (C 469/C 4610) for review and approval.

(2) Submit POIs for Marine Corps courses taught at multiple locations as separate MCTIMS Curriculum Management and Development Module produced documents simultaneously via the lead school to CG, TECOM under a single cover letter.

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

(1) Review other service school course data yearly to ensure the instruction adequately trains Marine Corps T&R 1000-level events.

(2) Submit the other service school course data along with a Marine Corps CDD for each other service school course attended by Marines to TECOM GTB/ATB for approval.

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

j. Course Content Review Boards (CCRBs). Plan and conduct CCRBs on all courses at a minimum every two years. Plan and conduct CCRBs within 120 days of the first T&R Manual revision conference for all affected courses. Invite SMEs from the operating forces/ supporting establishment to participate. Also invite the appropriate TECOM Task Analyst(s) and representative(s) from the advocate. Ensure the MCCLL is continuously monitored and addressed along with directives from higher HQ, changes to the T&R Manual, and requirements from the advocate.

k. Recommendations. Make recommendations for changes to T&R Manuals or improvements to any Marine Corps training and education programs, to CG, TECOM (C 469/C 4610 as applicable).

l. Operational Risk Management (ORM)

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

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

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

(4) Determine if a course has an ORM RAC I or II and submit a request (with justification) to CG, TECOM for approval and inclusion to the High Risk Training Courses at Formal Schools (enclosure (4)).

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

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

n. Standing Operating Procedures (SOP). Revise/validate schoolhouse SOP. (Refer to SATE Manual, Appendix E for SOP content checklist.)

o. HRT Category I and II. Commanding Officers/Directors/OICs, Marine Corps Formal Schools and Detachments with Courses Designated as HRT Category I and II.

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

(2) Brief all students on cease training procedures per Appendix J.

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

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

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

(6) Establish a schedule for the HRTSO to observe and evaluate all high-risk evolutions. See Appendix K for guidance.

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

(8) Ensure HRT course prerequisites include safety considerations.

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

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

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

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

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

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

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

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

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

6. Formal School Manager (FSM)

a. Each Formal School/Detachment will have a Formal School Manager (FSM) who assists the CO/OIC/Director in the execution of the provisions of this order. The FSM can be the Executive Officer, Operations Officer, Academics Officer, or Chief Instructor and will be designated in writing by the Formal School, PME School, or Training Detachment Commander/OIC/Director.

b. The FSM will maintain a desktop turnover binder to include, at a minimum, the FSM designation letter, a printed copy of each relevant T&R Manual, a printed copy of all approved POIs to include the CG approval letter for each, designation letters of one Course Chief per POI, copies of all ROPs

conducted within the previous three years, results of any CGIP inspections conducted within the previous three years, a printed copy of this order, and a printed copy of the SATE Manual.

7. Academics Officer/Section

a. Each Formal School, PME School, or Training Detachment will have an Academic Section comprised of a minimum of an Academics Officer, Academics Chief, and as many Course Chiefs as required by the provisions of this Order. If not designated as the FSM, the Academics Officer will assist the FSM in execution of the provisions of this Order.

b. The Academics Officer is responsible for oversight on execution of POIs, evaluation of POIs, and faculty development programs. The Academics Chief/Chief Instructor will assist in the execution of these duties. Other billets that can be included if manpower is available are Assistant Academics Officer and Testing Officer. The Testing Officer should be responsible for oversight on all testing procedures and collation and evaluation of test data as part of the Evaluation Phase of SATE.

8. Course Chiefs. COs/OICs/Directors will assign the most qualified personnel as Course Chiefs. Course chiefs will be drawn from the assigned instructors and are responsible for maintaining course records. As instructors, course chiefs will also be required to perform actual platform instruction albeit with a reduced course-load so they may fulfill their duties as course chief.

a. Billet Requirements

(1) Senior or Master Instructor in accordance with the minimum requirements of Appendix E.

(2) Sgt or above (all Course Chiefs will be active-duty Marines).

(3) FSIC and CDC graduate.

b. Course Development. Course Chiefs are active-duty Marines and will be the primary advocates for their respective POIs. Course chiefs should work closely with the school academics officer and resource manager in the performance of their duties.

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

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

(2) Record of Proceedings from all CCRBs conducted within the last three years.

(3) Observation, Environment, and Safety Checklists (SATE Manual, Appendix E) will be updated by the Course Chief for each MLF at least annually.

(4) Instructor Qualification Roster showing which instructors are qualified to give which lessons. (At a minimum, instructors will observe the lesson once and be evaluated giving the lesson by the Course Chief prior to being qualified to instruct the lesson to students.) Routinely updated based on instructor flow.

(5) After Instruction Report (SATE Manual, Appendix F) summarizing Instructional Rating Forms (SATE Manual, Appendix D) for each course iteration. (Instructional Rating Forms will be completed by at least 10% of all students immediately following each lesson.)

(6) Post-Graduate Surveys (refer to SATE Manual, Appendix D) conducted via mail, email, phone conversation, or in person. Surveys should be maintained until rendered obsolete by the next CCRB for the affected course.

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

(8) Training Schedules for each course iteration.

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

(10) After Instruction Report summarizing End of Course Critiques from all students (SATE Manual, Appendix D) with for each course iteration.

9. Primary Instructor

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

(2) A Primary Instructor is a Subject Matter Expert (SME).

(3) Standardized Primary Instructor hierarchy as follows: (Refer to Appendix E for certification requirements.)

(a) Basic Instructor

(b) Senior Instructor

(c) Master Instructor

(4) Primary instructors will complete the SATE, ORM DL, Basic Instructor Skills Course (BISC) courses and attend the Formal School Instructor Course (FSIC).

(5) Instructor Operational Risk Management Responsibilities

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

(b) Conduct time-critical ORA's as required and report findings to school administrators via the After Instruction Report (AIR).

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

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

10. Assistant Instructor

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

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

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

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

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

11. HRT Instructor Responsibilities

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

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

c. Conduct time-critical ORA's as required and report findings to school administrators via the After Instruction Report (AIR).

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

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

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

12. High-Risk Training Safety Officer (HRTSO) Responsibilities

a. Complete the Ground Safety for Marines and the ORM Indoctrination DL courses prior to assuming duties.

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

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

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

13. Curriculum Administrator/Developer

a. Marine, civil servant, other service member, or civilian contractor who conducts the analysis, design, develop, or evaluate phases of the SATE process in support of the POI.

b. Course Chiefs and supplemental curriculum administrators/developers will attend the Curriculum Developer's Course (CDC). Each POI will have at least one curriculum developer/ administrator but not more than two. (Course Chiefs are curriculum administrators/developers.) Requests for waivers will be addressed to CG, TECOM (C469TM). Course Chiefs will be graduates of both FSIC and CDC.

DRAFT

DRAFT

Chapter 3

Evaluation

1. Introduction. The goal of evaluation in the school or detachment is to determine the effectiveness of a training/education course. School Commanders/OICs/Directors are required to conduct course evaluations on an ongoing basis as part of the school's overall evaluation plan.
2. Purpose. The purpose of evaluation is to identify potential improvements to courses by:
 - a. Validating course content.
 - b. Assessing student achievement.
 - c. Measuring graduate performance.
 - d. Evaluating instructor performance.
3. Commanding General's Inspection Program (CGIP). Formal schools, PME schools, and training detachments will be inspected by the TECOM CGIP every two years in accordance with reference (m) and the AIRS 400 checklist. Current AIRS checklists are updated regularly and are available through the IGMC Marine Corps web site at: <http://hqinet001.hqmc.usmc.mil/ig>
4. Continuous Evaluation. Evaluation is continuous throughout all phases of the SATE process. Evaluations are conducted in accordance with reference (b). Formal school, PME schools, and training detachments conduct evaluations on an ongoing basis by collecting data from:
 - (a) Students.
 - (b) Graduates.
 - (c) Supervisors (of recent graduates).
 - (d) Marine Corps Center for Lessons Learned (MCCLL).

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

 - (e) Operating Forces.
5. Course Content Review Board (CCRB). The above referenced data sources, in addition to changes to the T&R Manual and initiatives from the advocate, will enable school commanders to make required changes to the course. These data become inputs to a Course Content Review Board (CCRB).
 - a. Record Of Proceedings (ROP). The results of the CCRB are captured in the ROP which are used to aid revisions of T&R Manuals and subsequently, POIs.

(1) The ROP will indicate that the CCRB members validated the pertinent task list(s), considered changes to the pertinent T&R Manual(s) and

sought and considered MCCLL information pertinent to the course being reviewed by the board.

(2) The CCRB ROP also provides the justification for recommended changes to published training standards and will be brought or forwarded to the members of the T&R Manual revision conference.

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

b. Formal CCRBs are planned and conducted by the school/detachment and will be attended by the representatives from the following organizations:

(1) Operating Forces.

(2) Occupational Field Sponsor.

(3) GTB/ATB Task Analyst (to the maximum extent possible).

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

(b) Will advise CCRB Chair on matters pertaining to conduct of the CCRB and development of T&R training standards.

c. CCRB Chair. The FSM or Academics Officer will be the designated CCRB chair and will ensure the CCRB is conducted in fair and equitable manner deferring to training requirements identified by Operating Forces representatives and the OccField sponsor.

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

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

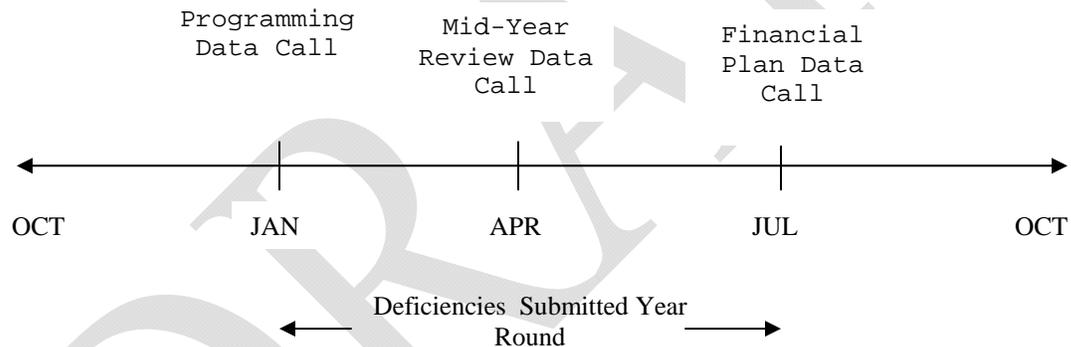
Chapter 4

Formal Schools Resources and Requirements

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

a. While the Programming and Budgeting processes are separate, programming and current year requests must be incorporated into a single Financial Plan for a school/detachment. The input to the Financial Plan data call will be inclusive of not only the previously established baseline, but also all requests and data call inputs that will effect the next fiscal year.

b. Data Submission Timeline



2. Programming

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

(1) Programming activities are conducted with the development of the service Program Objective Memorandum (POM) during even numbered years and the conduct of a Program Review (PR) during odd numbered years.

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

(b) PR year (odd numbered years). The focus is on addressing only those programs or activities requiring adjustment to allow them to complete their mission.

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

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

(4) MSCs, Schools and detachments will identify funding required by course, per approved POI or Proof of Concept CDD. School/detachment overhead costs must be tied to one and only one course- costs must not be duplicated in the data call (i.e. one instructor may teach multiple courses, but should only be tied to one course for accounting purposes).

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

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

3. Budget Financial Plan Submissions

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

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

(2) Training Command Formal schools and Marine Detachments will submit their financial plan information directly to the TECOM Comptroller per CG, TRNGCMD guidance.

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

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

(1) During the annual Financial Plan data call, identified deficiencies will reflect collective deficiencies on previously approved POIs that cannot be funded internally by the MSC, school, or detachment. To this end, all MSCs, schools and dets will review all CDDs when preparing their annual submissions.

(2) As needed during the fiscal year, when additional requirements are identified to support an approved Proof of Concept CDD or POI.

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

(4) All TECOM MSCs, schools, and detachments must understand that the programming (POM/PR) process is the primary vehicle/method for obtaining significant additional permanent funding resources.

(5) Other deficiencies

(a) Manpower. T/O deficiencies will be addressed through the Total Force Structure System. All T/O change requests will be submitted to CG, TECOM via the G-1.

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

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

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

4. Additional Support Requirements

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

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

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

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

c. When training and education support requirements, such as training devices, courseware, or specific technical expertise, cannot be filled by in-house Marine Corps or host command assets, it may be necessary to request contract support from organizations external to the Marine Corps.

(1) School commanders will forward requests for contractor support, with detailed justification, to CG, TECOM (C 461).

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

DRAFT

Chapter 5

Administration and Oversight

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

2. Management Tools

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

(1) Use Appendix H for System Change Request (SCR) or Production Trouble Report (PTR) submission. Appendix H is the primary means for resolving problems and submitting changes for any MCTIMS module. Submit SCR/PTRs to CG, TECOM (C469TM).

(2) School/Detachment Commanders/OICs/Directors will use the MCTIMS Student Registrar Module for automated enrollment, reporting of course attendance, attrition, and graduation.

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

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

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

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

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

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

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

(a) Inability to provide a class schedule that meets the planned input figures of the TIP must be fully explained by school Commanders/Directors to CG, TECOM (C4611).

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

(c) Course classes will not be canceled without prior approval of CG, TECOM (C 4611).

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

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

3. Safeguarding Protected Personal Information (PPI)

a. MCTIMS is an enterprise system that contains information on Marines, Civilians and other service personnel. PPI is any information or

characteristics that may be used to distinguish or trace an individual's identity, such as their name, Social Security Number (SSN), or biometric data. MCTIMS goes to great lengths to protect the PPI information contained within the system. All users of MCTIMS should ensure that adequate safeguards are implemented and enforced to prevent misuse, unauthorized disclosure, alteration, or destruction of PPI in accordance with reference (n).

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

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

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

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

4. Training Safety

a. Operational Risk Management in the Formal Schools/ Detachments

(1) Operational Risk Management (ORM) is a process that enables Commanders to plan for and minimize risk while still accomplishing the mission. Formal school, PME school and Training Detachment Commanders must

comply with the process detailed in references (j), (p), (q), and (r), when designing, developing, implementing, and evaluating training programs. The CG, TECOM retains the responsibility for oversight of ORM in the Formal/PME Schools and detachments and for ensuring ORM considerations are addressed during the analyze phase of the SATE process.

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

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

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

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

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

b. ORM Process Training and Education in Formal Schools, PME Schools, and Training Detachments

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

2. ORM Prior to Liberty. Commanders will provide liberty-specific Force Preservation ORM training and education to students and staff prior to commencing special liberty periods of 72 hours and greater. When feasible, the training and education will include a practical exercise requiring

students and staff to complete an ORAW for their planned activities, and the worksheets will be reviewed by the instructor or unit leader. CG, TECOM maintains a standardized ORM class for use by all schools, but local modification is at the discretion of the commander.

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

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

(2) HRT is defined in the Formal/PME School setting as:

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

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

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

(3) The planning and execution of all training, to include HRT, shall incorporate ORM to minimize risk while providing the realism needed to meet operational requirements. Additionally, all prospective HRT instructors (military and civilian) shall be screened for suitability prior to assuming their duties according to reference (o) and enclosure (2).

(4) To support the School/Detachment HRT program the Commander will assign, as a collateral duty, a HRT Safety Officer (HRTSO). Depending on School/Unit size, the Commanding Officer/Director/OIC may need to appoint more than one HRTSO. The HRTSO functions as the Officer's/Director's/OIC's resident expert for all aspects of HRT events. The HRTSO is responsible for ensuring the ORM process is fully implemented to minimize risk during all HRT.

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

(6) Formal/PME School and Training Detachment Commanders are required to institute the policies contained in references (i), (j), (p), (q), (r), and this Order, to ensure every reasonable measure is taken to reduce the risk of injury or loss of life. Nothing in these Orders supplants the need for Commanders to be involved in all aspects of training. The intent is to implement the rigors of a sound ORM process in combination with the time-tested, common sense approach to leadership and adherence to the Marine Corps' Training Principles.

DRAFT

APPENDIX A

COURSE DESCRIPTIVE DATA

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

APPENDIX B

TECOM DEFICIENCY WORKSHEET



UNITED STATES MARINE CORPS
TRAINING AND EDUCATION COMMAND
1019 ELLIOT ROAD
QUANTICO, VIRGINIA 22134

7000
req
(Date)

From:
To: Commanding General, Training and Education Command (C464)
Via: Commanding General, Training Command
Subj: TECOM DEFICIENCY WORKSHEET

- 1. Requesting Unit/Section: _____
- 2. POC, Phone & E-mail: _____
- 3. Appropriation: _____ (O&M,MC)
- 4. AGSAG: _____

AGSAG:
3A1C Recruit Training
3A2C Officer Acquisition
3B1D Specialized Skills Training
3B2D Flight Training
3B3D Professional Development
3B4D Training Support
3C3F Marine Corps JROTC
4A2G Heritage Center

- 5. Title of Deficiency:
- 6. Amount Requested:
- 7. Priority: __ of __

8. Importance: Critical, Important, or Enhancing

Critical: Makes complete difference to unit/section's capability to operate.
Important: Should do, unit/section degraded in ability perform mission without.
Enhancing: Good to do, unit/section will improve existing capabilities.

9. Description of Issue and reason for request:

Ensure **DETAILED** descriptions are provided by the commodity manager to preclude follow-on questions, i.e. provide all who, what, when, where, why and how. Include item/service description, T/E #, TAMCN, NSN, Source Of Supply, Quantity, Prices, and total costs as applicable. Also describe the requirement that's driving the funding request, i.e. specific approved (conditional) Program of Instruction (POI), TECOM directive, T/E shortfall, Urgent Universal Needs Statement (UUNS), safety requirement.

10. Operational Impact AND Impact if not funded: Use performance metrics as applicable. Initially, outline the operational impact (improvement/benefit/enhancement) if the funding request is supported. Then, outline what will be the operational impact if the funding request is not supported. Should clearly answer the “so what” question. Additionally, impact statements should leave no doubt to the reader as to mitigating actions commanders/section heads are prepared to take should additional funding not be available.

1 of 2

11. New Contract(s) Establishment Required: Yes/No, specify dollar amount

12. Category of Funding Required:

- a. Operations & Maintenance, Marine Corps (O&M,MC)
- b. Procurement, Marine Corps (PMC)
- c. Research Development Testing & Evaluation (RDT&E)

13. FY08 Deficiency Phasing Requirement (If Funded) (\$)

	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Total
Budgeted Amt	Input Budgeted amount only in Total column												Ex. \$3M
Required Amt	Input Required amount only in Total column												Ex. 3.5M
Deficiency							200,000	200,000	100,000				Ex. 500,000

For deficiency amount: Specify actual month(s) funding required.

Also, all dollar amounts should address the specific program/deficiency area and NOT the unit/section’s entire budget.

14. FY08 O&M Deficiency (\$)

Category	Amount (\$)
Civilian Pay (Civil Svc)	
TAD	
Supplies (Incl. Fuel)	
Equipment	
Printing/Repro	
Maintenance	
Postal	
Service Contracts	
Other (Specify)	
MIPRs/WRs (Specify purpose)	

Notes: Specify number of contractors to be purchased for any service contracts.

15. Recurring Outyear O&M Costs (As applicable) (\$)

Appn	FY09	FY10	FY11	FY12	FY13	FY14	Total
O&M							

2 of 2

APPENDIX C

POI Checklist

POI CHECKLIST					
COURSE NAME:			CID:		
CHECKED BY:			DATE:		
ITEM			Y	N	REMARKS
COVER LETTERS					
1	Cover letter (or endorsement letter) is included with the same date as POI submission				
2	Cover letter summarizes POI (revisions, changes, deficiencies)				
PAGES ii - iv					
3	POI contains record of changes page ii				
4	POI contains preface page iii, w/ course purpose, graduates information, and POC				
5	POI contains table of contents page iv				
SECTION I - COURSE DESCRIPTIVE DATA					
6	CDD reflects course title and matches student registrar and TIP - 1				
7	CDD reflects school name and address with the location reflected in the CID - 2				
8	CDD reflects Course ID (CID) that matches the student registrar - 3				
9	CDD reflects other service course number - 4 (may not have equivalent course)				
10	CDD contains Military Articles and Service List number (MASL) - 5 (may not apply)				
11	CDD purpose identifies course intent - 6				
12	CDD scope identifies all areas of instruction - 7				
13	The number of training days is correct (length peacetime) and compares to hours - 8				
14	Course peacetime length equates to curriculum breakdown - 9				
15	Mobilization length justified - 10				
16	Course mobilization length equates to curriculum breakdown - 11				
17	CDD reflects max class capacity - 12				
18	CDD reflects optimum class capacity - 13				
19	CDD reflects min class capacity - 14				
20	CDD reflects class frequency (consistent with TIP)- 15				
21	CDD reflects student target population description and prerequisites - 16				
22	CDD reflects MOS received - 17				
23	CDD reflects quota control - 18				
24	CDD reflects funding agency - 19				
25	Reporting instructions contain messing and billeting notes - 20				
26	Supervisor and instructor billets identified - 21				
27	Instructor staffing notes present				
28	School overhead billets identified - 22				
29	School overhead notes included				
30	Training/Education support requirements are identified - 23				
31	Training/Education support requirements notes are included				
32	Task List is identified and matches T&R events- 24				
SECTION I - APPENDIX A - INSTRUCTOR COMPUTATION WORKSHEET (ICW)					
33	ICW notes are present, clear, concise and state how many instructors are needed				
34	There are no "half" numbers for instructors (0.5)				

SECTION I - APPENDIX B - TASKLIST				
35	Tasklist is consistent with T&R Manual events			
SECTION II - SUMMARY OF HOURS				
36	Summary hours are appropriate for duration of class			
37	Total time justifies the total number of training days			
SECTION III - SCOPE OF ANNEXES				
38	Scope of Annexes defines the purpose of each annex			
SECTION IV - CONCEPT CARDS				
39	Contains a location of Learning Objectives Report			
40	Academic Summary justifies the total academic/administrative time			
41	Academic Summary shows evaluated lessons			
42	Each LO is assigned to concept card			
43	Each LO is assigned to an evaluation concept card			
44	Contains complete concept cards			
SECTION IV - INDIVIDUAL CONCEPT CARDS				
45	Lesson ID correct			
46	Lesson title			
47	Appropriate annex listed			
48	Total hours appropriate for lesson			
49	All methods and hours listed			
50	Student to Instructor ratio is appropriate for the method			
51	All forms of media listed <small>(not required for admin concept card)</small>			
52	Ammunition requirements listed <small>(may not apply)</small>			
53	Concept cards contain notes that clarify activity			
54	Concept cards contain Terminal Learning Objectives (TLOs), and Enabling Learning Objectives (ELOs) derived from LOW			
55	TLOs are only on concept cards in which they are being performed			
56	ELOs are only on concept cards in which they are being performed			
57	Explanations of all abbreviations/terms			
58	TLOs contain condition, one behavior and standard verbatim from T&R event			
59	Downgrade justification included for tasks that cannot be performed to standard			
60	ELOs contain condition, one behavior and standard.			
61	Training support equipment annotated in media			
62	All references required to conduct class are listed on corresponding concept card			
63	LOs listed in the order they are to be taught or evaluated			
64	Administrative card describes event in detail (check in, check out, graduation)			
65	Administrative concept card(s) is/are located in Annex Z			
SECTION V - STUDENT PERFORMANCE EVALUATION				
66	Contains statements that describe the purpose of the student's evaluation			
67	Contains statements that describe the method(s) of the student's evaluation			
68	Contains statements that describes remediation procedures and for what happens if student fails remediation			
69	Contains statements that describe course mastery/graduation criteria			
SECTION VI - DISTRIBUTION LIST				
70	Distribution list contains the agencies which the POI is to be distributed			

USEFUL INFORMATION	
To find calendar days - divide training days by 5 and multiply by 7 = estimated calendar days	
To find training days - divide calendar days by 7 and multiply by 5 = estimated training days	
Average length of a training day = total academic hours divided by training days	
For mobilization 10 hour day, 6 day week	
TAD = 139 calendar days or less	PCS = 140 calendar days or more
Funding - (PCS = MILPERS) (TAD = TECOM (C464) or unit funding)	

Course Chief: _____

Formal School Manager: _____

Commanding Officer: _____

DRAFT

APPENDIX D

SAMPLE COVER LETTER



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

IN REPLY REFER TO:
1553.2
CO
Date

From: Commanding Officer
To: Commanding General, Training and Education Command
Subj: PROGRAM OF INSTRUCTION FOR XYZ COURSE (CID: 12345)
Ref: (a) MCO 1553.2B
Encl: (1) CDD&POI Material Deficiencies for XYZ Course
(2) Program of Instruction for XYZ Course

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

//CO Signature//

Copy to:
Files
S-3 Academics Director

APPENDIX E

INSTRUCTOR ROADMAP

United States Marine Corps

Road Map

The road to success for

Instructor of Marines

Current as of: 1 Mar 2008

Questions concerning this roadmap may be directed to Training Management and Evaluation,
TECOM, Quantico, VA at (703) 784-3029 DSN 278 or peter.doughty@usmc.mil

"Leadership is the sum of those qualities of intellect, human understanding, and moral character that enables a person to inspire and control a group of people successfully." - John A. Lejeune

"Education is the mother of leadership." - Wendell Willkie

"A teacher affects eternity; he can never tell where his influence stops." - Henry Brooks Adams

More than any time in the past, Marines, officers and enlisted, are expected to intelligently manage their respective careers. This roadmap is intended to aid Formal School/PME School/Training Detachment Leadership and staff in formulating Instructor development plans as well as providing a standardized service-level plan to lend meaning and credibility to the terms Basic, Senior and Master Instructor.

The Marine Corps depends on the professionalism of all of its members, private through general officer, and it is critical that you understand the training and education expectations of the Corps and the options available to you through this phase of your Marine Corps service.

An Instructor of Marines must be of exceptional character. An instructor will not be eligible for certification while any disciplinary action is pending or being executed. The instructor will be a positive role model for other instructors and Marines to emulate.

Marines, more than any other segment of our society, are lifelong learners. All Marines are encouraged to voluntarily continue their education and to actively pursue the next level. This Instructor of Marines Roadmap contains voluntary education recommendations. Make good use of them.

Basic Instructor

1st Year

SKILL TRAINING

Required Skill Training (Prior to being designated a Basic Instructor)

- Resident and non-resident school/course requirements necessary for Marines/civilians to obtain the certification.

- Systems Approach to Training (SAT)	MarineNet	UT01AO
- Operational Risk Management (ORM)	MarineNet	DI5101A
- Basic Instructor Skills Course (BISC)	TECOM website: https://www.intranet.tecom.usmc.mil/sites/gtb/sections/tme/default.aspx	
- Formal School Instructor Course (FSIC)	Camp Johnson, NC	M03XRGA
	Camp Pendleton, CA	M10XRG1

Recommended Billet Assignment

No action is required by you. You will be assigned as a Formal School Instructor at a TECOM Formal School/PME School/Training Detachment.

PROFESSIONAL MILITARY EDUCATION

Professional Reading

Instructors are expected to read and discuss with fellow Marines/civilians the following publications:
MCO 1553.1B "The Marine Corps Training and Education System"
"The Systems Approach to Training and Education (SATE) Manual" – Implementation Chapter

VOLUNTARY EDUCATION

Recommended College Courses and Degrees

For more information on voluntary education, see your base education office.

Recommended Majors

- Educational Leadership
- Adult / Higher Education
- Educational Research and Methodologies
- Curriculum Development and Evaluation
- Education / Instructional Technology
- Evaluation of Instructional Systems, Training Design and Development
- Training Occupational and Corporate Education

Master Instructor

3rd Year

SKILL TRAINING

Required Skill Training (prior to being designated a Master Instructor)

-Formal School Commander Course (FSCC) TECOM website:
<https://www.intranet.tecom.usmc.mil/sites/gtb/sections/tme/default.aspx>

- Eight formal satisfactory evaluations
- 500 hours of student contact time
- Active mentoring of Basic Instructors
- Participated in a CCRB
- Participated in evaluation data analysis
- One year as a Senior Instructor

Recommended Billet Assignment

- Chief Instructor
- Course Chief
- Formal School/PME School/Training Detachment Instructor
- Curriculum Developer

PROFESSIONAL MILITARY EDUCATION

Professional Reading

Instructors are expected to read and discuss with fellow Marines/civilians the following publications:

MIL-HDBK-29612-2A, 31 August 2001 – Department of Defense Handbook: Instructional Systems Development/Systems Approach to Training and Education (Part 2 of 5 Parts)

VOLUNTARY EDUCATION

Recommended Majors

Continue with the recommended majors outlined for a Basic Instructor.
Consider Graduate education.

APPENDIX F

Formal School Instructor Course (FSIC) Pre-screening Checklist

From: Academics Officer (command name)
 To: Director, Train the Trainer School (T3S)
 Subj: NOMINATION OF _____ TO THE FORMAL
 SCHOOL INSTRUCTOR COURSE (CID_____CLASS #_____) ATTENDANCE
 CONFIRMATION AND CHECK-IN LIST

1. The above named nominee has been screened to determine if the below prerequisites have been met. The nominee will be available to be TAD for the full 5 working days.

FSIC PREREQUISITES	YES	NO
1. Has a Master Lesson file containing all required elements prescribed in the SATE Manual.		
2. Has a Lesson Plan in MLF must be lecture/demo/PA that is 50 min. in length.		
3. Has a Power Point Presentation in electronic format. (If PPT is used as media)		
4. Has all Media in the MLF required to teach the lesson. (PPT, Training Aids, etc.)		
5. Has completed the SAT IMI.		
6. Has completed the ORM IMI.		

2. I understand that a NO response on the above checklist disqualifies the nominee and his/her name will not be entered into MCTIMS Student Registrar. I understand that the Director of T3S may grant a waiver to this policy on a case-by-case basis.

3. I certify that I have screened the above named nominee for the requirements to attend the T3S Course.

Print Name / Billet _____

Signature _____ Date _____

APPENDIX G

Curriculum Developer Course (CDC) Pre-screening Checklist

From: Academics Officer (command name)
 To: Director, Train the Trainer School (T3S)
 Subj: NOMINATION OF _____ TO THE
 CURRICULUM DEVELOPER COURSE (CID_____CLASS #_____)
 ATTENDANCE CONFIRMATION AND CHECK-IN LIST

1. The above named nominee has been screened to determine if the below prerequisites have been met. The nominee will be available to be TAD for the full 10 working days.

CDC PREREQUISITES	YES	NO
Is proficient with Microsoft Word and PowerPoint.		
Has a good written communication skill.		
Is a graduate of the Formal School Instructor Course (FSIC) or has completed the Basic Instructor Skills Course (BISC).		
Has completed the SAT IMI.		
Has completed the ORM IMI.		

2. I understand that a NO response on the above checklist disqualifies the nominee and his/her name will not be entered into MCTIMS Student Registrar. I understand that the Director of T3S may grant a waiver to this policy on a case-by-case basis.

3. I certify that I have screened the above named nominee for the requirements to attend the T3S Course.

Print Name/Billet _____

Signature _____ Date _____

<p><u>3. Testing Requirements:</u></p>
<p><u>3.a. Steps to Test (Reproduce):</u></p>
<p><u>3.b. Expected Results:</u></p>

4. Justification (for Need and Priority):**Approved By:****Date Approved:**

What are System Change Requests and Production Trouble Reports?

- A ***System Change Request (SCR)*** is a documented request to change or enhance the MCTIMS software.
- A ***Production Trouble Report (PTR)*** is a documented problem in the production system where functionality does not work as it was originally designed.

What do the priority levels mean?

- **1. Emergency:** Critical core functionality is not working for a broad user base and for which there is no viable temporary workaround solution. This will more than likely require an emergency production deployment.
- **2. Urgent:** For PTRs, critical core functionality is not working for a limited user base or for a broad user base there may be a temporary workaround which causes some user discomfort. This may require an emergency production deployment outside of the normal release cycle, unless a quarterly release is pending.
- **3. Must Fix:** For PTRs a workaround exists which does not impact many users. For SCRs, this priority level indicates new functionality which must be introduced to the production system.
- **4. Fix if Time:** For PTRs, few if any users are impacted in a negative manner. The problem may even be seamless to the end-users. For SCRs, these should eventually be implemented, but after all #3 priority SCRs are completed.
- **5. Nice to Have:** For PTRs, no users will ever discover the problem (unlikely). For SCRs, these items are considered to be gold-plating once all other higher priority SCRs/PTRs have been implemented. These items may be raised to a higher priority as time progresses.

APPENDIX I

Operational Risk Assessment Worksheet (ORAW)

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

APPENDIX J

CEASE TRAINING (CT) PROCEDURES AND REQUIREMENTS

1. Ensure all students are briefed on CT policy and procedures prior to the start of any training evolution (i.e., during the course indoctrination). Specific verbal and/or non-verbal CT signals shall be reviewed prior to commencing any high-risk evolution. For multi-day evolutions, CT procedures will be re-briefed prior to commencing each day's training. Evolution specific CT procedures should be put in place where needed. All procedures should be standardized (with the exception of evolution specific) throughout the course.
2. CT may be called when a student or instructor expresses concern for personal safety; when a student or instructor requires relief from pain, heat stress, or other serious physical discomfort; when the procedures/requirements need explanation; or in cases of potential damage to equipment.
3. Both primary and assistant instructors must maintain situational awareness at all times and be alert to signs of student panic, fear, extreme exhaustion, or lack of confidence that might impair safe completion of the training evolution.
4. Following a CT call, the situation shall be examined and additional safety controls shall be put in place to allow safe resumption of training. Once the lead, on-scene instructor has fully reviewed the situation and put controls in place, he/she will make the decision to resume training, unless the school/ detachment SOP directs otherwise.
5. If a student refuses to participate in training after appropriate safety controls have been put in place, or excessively and inappropriately uses the CT call to disrupt training, that student shall be removed from training and referred for administrative processing, that may include permanent removal from the training program.
6. Both primary and assistant instructors will document pertinent information (date, time, persons involved, equipment or facilities involved, conditions, situation, and out come) for every CT occurrence. The After-Instruction Report (AIR) is the recommended vehicle for documentation.
7. Example of a CT brief:

"A Cease Training (CT) may be called by any student or instructor in any training situation when he is concerned for his own or another's safety, or he requests clarification of procedures or requirements. The purpose of CT is to avoid serious injury or loss of life, and to correct the hazardous situation so training can continue. CT should be used to remove students or instructors from a possible hazardous situation. A CT may be signaled by (...Insert appropriate nonverbal, alarm, or hand signal...). If the CT signal is not acknowledged, the signaler shall shout 'Cease Training' (or other action as required by the training activity)."

Add amplifying information/procedures as needed.

APPENDIX K

FORMAL SCHOOL HRT INSTRUCTOR PROGRAM

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

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

2. Commanding Officer's/Director's Interview

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

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

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

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

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

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

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

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

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

De-certification

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

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

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

APPENDIX L

DEFINITIONS AND PROCEDURES

1. **High-Risk Training (HRT)** is defined in the formal school setting as: Basic or advanced individual or collective training, essential for preparing Marines and units for combat, that exposes students and instructors to the risk of death or permanent disability despite the presence and adherence to proper safety controls. Enclosure (8) is a list of courses designated as HRT.
2. **Formal training** is defined as training (consisting of formal courses of instruction) conducted by Marine Corps formal schools, detachments and training centers and depots. It may also encompass other formal schools and training centers whose curriculum falls under MCCDC's cognizance and/or review. Formal courses are identifiable by assigned course identification (CID).
3. **Operational Risk Management (ORM)** is the process of dealing with risks associated with military operations. It includes risk assessment, risk decision-making and implementation of risk controls. All formal HRT courses will incorporate ORM in their planning and execution in accordance with reference (i) to ensure safe training that also provides the realism needed to fulfill Marine Corps requirements.
4. **Pre-Mishap Plan** is to be implemented in the event of a mishap. A Pre-Mishap Plan shall be developed for all HRT evolutions and shall include (at a minimum) the following: procedures for summoning medical and other appropriate emergency response teams; locations of first aid kits, fire extinguishers, and any other on-site emergency equipment; procedures for emergency operation/shutdown of training equipment; backup communications procedures; sequential listing of personnel to be notified; and any other data as appropriate. All reasonable scenarios shall be anticipated and Standard Operating Procedures (SOP) developed to cope accordingly. The Pre-Mishap Plan shall be posted or otherwise available to all personnel at each HRT site. Students will be briefed on the Pre-Mishap Plan prior to commencing training. The plan will be reviewed upon completion of each course cycle.
5. A **safety review** is a comprehensive review of HRT to ensure courses are being taught with minimum risk to personnel. The safety review shall include the application of Operational Risk Management (ORM), review of training mishap data, near misses, curriculum, instructional techniques, and safety requirements incorporated within the course curriculum. Particular attention shall be paid to any course changes or modifications (physical, technical, and procedural) that may impinge on the overall safety posture. Safety reviews will be conducted on an annual basis, documented, and a report submitted to the Commanding Officer/Director.
6. The **High-Risk Training Safety Officer (HRTSO)** is an SNCO/officer or civilian employee designated (in writing) by the Commanding Officer/Director and responsible for the oversight of all HRT.
7. A **High-Risk Instructor** is an individual certified to instruct the high-risk portions of any course. Must be a graduate of the Formal Schools

Instructor Course (FSIC) and hold a CPR, or higher lifesaving certification. Personnel currently assigned to this duty (or assigned within a period of time not to exceed six months after the effective date of this Order), who do not meet these requirements, are exempted. See enclosure (2) for requirements.

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

DRAFT

APPENDIX M

RESOURCE ASSISTANCE GUIDE

RESOURCE ASSISTANCE GUIDE*						
Resource Activity	Budget	Manpower	Facilities	Equipment	Ammunition	Remarks
TECOM Staff	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
TRNGCOM	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
EDCOM	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
MCRD	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
MAGTFTC	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
MAWTS-1	MAGTFTC	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
MWTC	MAGTFTC	TECOM, G1	MCB CamPen	MCB CamPen	MCB CamPen	Per MOA w/CamPen
Formal School Quantico	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	
Formal School CamLej	TECOM, Comptroller	TECOM, G1	MCB CamLej	TECOM, G4	MCB CamLej	Per MOA w/CamLej
Formal School CamPen	TECOM, Comptroller	TECOM, G1	MCB CamPen	MCB CamPen	MCB CamPen	Per MOA w/CamPen
MCCES	TECOM, Comptroller	TECOM, G1	MAGTFTC	MAGTFTC	MAGTFTC	Per LOI to MAGTFTC
SNCOA Hawaii	EDCOM	EDCOM	MCB Hawaii	MCB Hawaii	EDCOM	Per SNCOA LOA
SNCOA Okinawa	EDCOM	EDCOM	MCB Camp Butler	MCB Camp Butler	EDCOM	Per SNCOA LOA
SNCOA 29 Palms	EDCOM	EDCOM	MAGTFTC	MAGTFTC	EDCOM	Per SNCOA LOA
SNCOA Quantico	EDCOM	EDCOM	EDCOM	EDCOM	EDCOM	Per SNCOA LOA
Detachments (Training)	TECOM, Comptroller	TECOM, G1	TECOM, G4	TECOM, G4	TECOM, G4	Per MCO 1580. 7D
Detachments (PME)	EDCOM	EDCOM	EDCOM	EDCOM	EDCOM	

*In general, the EDCOM/GTB/ATB task analyst is the primary POC for resource issues related to POIs. For all other resource matters, TECOM organizations and activities are encouraged to contact the office indicated above with questions and for problem resolution.

M&RA HRT INSTRUCTOR PRE-ASSIGNMENT CHECKLIST

1. **Prerequisites.** To be considered for assignment to a high-risk training instructor billet, all personnel must meet the following criteria (where applicable, hiring- or position-description criteria shall specify requirements for civilian personnel):

a. A minimum of two years left on their current enlistment (or agree to extend or reenlist) prior to executing such orders.

b. No court-martial convictions within the past 5 years and not more than 2 NJPs within the past 5 years (no more than 1 NJP in the 12 months preceding transfer date).

c. No drug-related incidents within the last 5 years and no alcohol-related incidents within the last 2 years preceding the transfer date.

d. Meet personal appearance and weight standards with no unresolved history of assignment to weight control or personal appearance programs.

e. Pass the PFT.

f. Complete an instructor-training course prior to executing orders (or during delay en route). Courses are currently taught at Camp Lejeune (M03XRGA), Camp Pendleton (M10XRG1), and also by Mobile Training Teams from either of these bases (M03XRGM and M10XRGM). Personnel having successfully graduated from Navy Instructor Training School (receiving an NEC of 9502) are excluded.

2. **Medical Screening.** Coordinate with the detaching command to request a medical record screening. Any findings suggestive of a behavioral problems or difficulty in interpersonal relationships, such as any medically documented problems related to hypertension, stress, alcohol related or psychological dysfunction, etc., are potentially disqualifying and must be identified.

3. **Findings.** A report summarizing the results of the prerequisites and Medical Screening findings will be forwarded to the formal school or detachment commander.

FORMAL SCHOOL SEAT COORDINATING INSTRUCTIONS

1. Marine Corps Training Input Plan (TIP). This is a five-year training plan that represents a deliberate effort to identify all formal training requirements. It also represents the cornerstone for out-year budget plans, and it serves as the basis for allocating funds for centrally controlled programs. The TIP provides the schoolhouse, HQMC, and MCCDC the ability to conduct long term planning, programming and budgeting actions. The Deputy Commandant for Manpower and Reserve Affairs (DC, M&RA), Commander, Marine Forces Reserve, and Occupational Field Sponsors all provide requirements for this plan. The Training Input Plan is developed and maintained by Formal Schools Training Branch, Training Command (C 4611).

2. Requirement Sponsors. In general, CMC (M&RA) provides all entry-level (active and reserve, officer and enlisted), all lateral move, and some skill progression (normally, all skill progression which leads to a primary MOS (PMOS)) training requirements used to develop the TIP. MARFORRES provides all non entry-level SMCR requirements, while Occupational Field Managers provide non-PMOS and some skill progression (non-PMOS) requirements for the TIP. M&RA (MP/RA) develops current and out-year plans for entry-level training and other active component PMOS training and submits them for entry into the TIP. MARFORRES submits reserve component PMOS requirements for post entry-level training.

3. Processing Cycle. CG, Training and Education Command (TECOM) (C 46) publishes the TIP annually per the TIP Processing Schedule. There are two key reasons for the TIP processing schedule: it allows the Marine Corps to align its training requirement development time-line with that of the other Services, and it aligns our training requirement development process with the Program Objective Memorandum (POM) and Budget processes.

The basic steps in the TIP process are summarized below: (PFY = Present Fiscal Year)

- | | |
|--------|---|
| 15 Feb | C 4611 publishes & distributes the training input plan for next fiscal year [PFY+1]. Distribution is via Training Information Management System (TIMS) website. |
| 5 Mar | Annual TIP conference for PFY+2. All sponsors in attendance. |
| 1 Jun | Receive all class schedules from all schools for the next fiscal year [PFY+1]. |
| 15 Jul | Publish training quota memoranda (TQM) (class schedules and requirements) for next fiscal year [PFY+1]. |

4. Execution

a. The objective of the TIP solicitation conference is to solicit TIP requirements from recognized requirement sponsors, and validate the training track and course data managed by C 4611. The conference is approximately 5 days in length and covers every formal course approved by CG MCCDC. Face-to-face coordination between C 4611, Occupational Field Managers, and MARFORs, along with requirement comparison with historic throughput are advantages of the conference that make it vital to TIP development. For this reason, C 4611 will not entertain TIP submissions outside of the conference unless the submitting activity conducts all coordination that would have been

accomplished during the conference. Throughout the conference, training requirements are entered directly into Student Registrar for compilation into the TIP.

b. Once published, the TIP functions as the baseline document for C 4611 to produce Training Quota Memoranda (TQM) during the execution year. Financial Management (C 464) uses the TIP to determine the dollar costs associated with projected training. It is also used by Manpower Management (C 460) to evaluate instructor requirements, and schoolhouses use it to produce course schedules and to program resources to support training.

c. For all MOS and individual course requirements, M&RA, Occupational Field Managers and MARFORRES training specialists must determine what their training requirements will be for the present fiscal year plus one year, and make projections for the following four out-years. We recognize that most Occupational Field Managers and MARFORRES planners do not have the same planning tools as the manpower planners at M&RA.

However, they must consider all issues that will impact the need for training and provide their best-educated estimate of what is both necessary and feasible. This is extremely important because the TIP is the basis for budgeting and funding travel, per diem, and school overhead costs; manpower requirements, in terms of instructors, are also based on it. If we overestimate either the need or availability of Marines to train, we may over-obligate funds or program seats we won't use. On the other hand, if we underestimate our need, we will have to make special efforts to fund and obtain unplanned school seats. This process is especially critical with respect to other Service (Army, Navy, and Air Force) training. Often, our quotas to other Services' courses are tied to instructor and budget support. This support has been established by formal or informal agreements based on student throughput. If that throughput changes, we will be asked to increase our instructor and monetary support. Since it is extremely difficult to identify structure and money to compensate for non-programmed requirements, every possible effort must be made to ensure training requests are absolutely valid and supportable. Therefore, every available information source must be used to determine accurate training needs. Some, but not all, of the possible information sources are the Tables of Organization (T/O), the assignment monitors at M&RA (MMOA/MMEA), Marine Forces training coordinators, knowledge of upcoming changes (equipment, structure, mission, etc.), MCCDC (C 46), and MPP.

d. When submitting requirements at the TIP conference, all submissions will be compared to the average of the last 3 years throughput, as reflected in the MCTIMS Student Registrar. Any requirement submissions not justified by MCTIMS throughput will be denied unless significant justification is provided.

5. Training Input Plan Changes. The training process is dynamic and requirements will inevitably change. Please remember the TIP is a planning document and actual training execution may vary. As changes occur during the course of each execution year the TQM, which identifies courses, classes, and student quotas, will be updated. The updated TQM will be loaded into the Student Registrar and the MCTIMS Website (<https://timsapp.tecom.usmc.mil>). For this reason, MCTIMS Student Registrar is your primary source for course, class, and quota information during the execution year.

6. Requirements/Training Constraints. The requirements listed in the TIP are the projected number of students who need to be trained during the FY to meet USMC manning and MOS needs. Inability to meet the requirement degrades operational readiness and leads to a backlog of Marines awaiting training. Therefore, schoolhouses must strive to train to the stated requirement. Specifically, schoolhouses must endeavor to schedule their classes to provide sufficient capacity during each trimester in order to meet the requirement for that trimester (refer to TIP/TQM Reference Guide on the MCTIMS Website for a complete explanation of "Trimesters"). If a course of instruction's capacity is constrained and the requirement cannot be met, the schoolhouse must aggressively determine the nature of the constraint (instructors, facilities, equipment, billeting, funding, etc.) and immediately report it to the CG, Training Command (C 47).

7. Validation Requirement. On 13 June 2005, the Marine Corps began using the Student Registrar as the sole source of data to validate training utilization, training requirement estimates, and funding for training quotas. This means that C 4611 will measure course utilization for each year and compare it to the sponsors' stated formal training requirements for the year. By collecting this data, C 4611 will provide a measure of effectiveness for requirement planning and actual training execution. C 4611 will also use the data to justify our formal training requirements with the other services and in the budget process. To ensure we have accurate and timely information in Student Registrar, it is absolutely essential that schoolhouses validate their class rosters in Student Registrar upon graduation. Use of Student Registrar is mandatory.

HIGH-RISK TRAINING COURSES AT FORMAL SCHOOLS

MARINE CORPS FORMAL COURSES

East Coast

Quantico, VA:

M02GPR9 BREACHER INSTRUCTOR COURSE
M02KAL9 URBAN MOBILE BREACHER COURSE
M02M729 BASIC BREACHER

Little Creek, VA:

N03AHK1 BASIC RECONNAISSANCE COURSE

Camp Lejeune, NC:

M031302 BASIC COMBAT ENGINEER
M0381KB COXSWAIN SKILLS (CRRC/RRC)
M03ACC2 COMBAT ENGINEER OFFICER
M03ACS2 COMBAT ENGINEER NCO
M03H4JB SMALL BOAT COXSWAIN (RIVERINE) PHASE II

Dive School, Panama City, FL:

N2016H1 MARINE CORPS COMBATANT DIVER COURSE

SERE School, Brunswick, ME:

N51M5Q1 SURVIVAL, EVASION, RESISTANCE, AND ESCAPE (SERE)

West Coast

Bridgeport, CA:

M24M7A1 SUMMER MOUNTAIN LEADERS
M24M7B1 WINTER MOUNTAIN LEADERS

Coronado, CA:

N30AHK1 BASIC RECONNAISSANCE COURSE
N28M5Q1 SURVIVAL, EVASION, RESISTANCE, AND ESCAPE (SERE)